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FAS Quarterly Reference Guide To World Horticultural Trade: 2004 Charts Edition

Presentations Illustrating Major Trade Trends, Country Features, and Commodity Situations



Issued June 2004

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Welcome to the 2004 FAS Quarterly Reference Guide to World Horticultural Trade: Charts Edition.

The *FAS Quarterly Reference Guide to World Horticultural Trade* will comprise the following four issues:

1. Production, Supply, and Distribution Edition. This publication will include 5 years of Production, Supply, and Distribution Data for over 30 products. (January 2004). Additional information is available on the Web at:
<http://www.fas.usda.gov/psd/>
2. Charts Edition: illustrating major trade trends, country features, and commodity features (April 2004)
3. Trade Data Edition (July 2004)
4. Trade Policy Edition (October 2004)

These four publications replace the written monthly publication **World Horticultural Trade and U.S. Export Opportunities**.

Visit the HTP Homepage!

These presentations and more, including links to the new FAS Maximum Residue Limits (MRL) databases, are available on the Horticultural & Tropical Products (HTP) Division Homepage.

The analytical articles formerly published in ***World Horticultural Trade and U.S. Export Opportunities*** are now updated on the Horticultural and Tropical Products Division Homepage at: <http://www.fas.usda.gov/htp/>. The HTP Homepage is updated weekly with the latest information on policy and technical developments affecting trade in horticultural commodities. For further information on this site, please contact Nancy Hirschhorn at (202) 720-2974.

Marketing Years for Key Horticultural Products

Commodity	Marketing Year
Almonds	July 1-June 30
Apple	July 1-June 30
Avocados	October 1-September 30
Cherries	May 1-April 31
Blueberries	January 1-December 31
Grapes (Table)	June 1- May 31
Grapefruit	September 31-August 1
Hops	September 31-August 1
Juices, Fruit	December 1-November 30
Lemons	August 1-July 31
Lettuce	January 1-December 31
Limes	April 1-March 31
Melons	January 1-December 31
Oranges	November 1-October 31
Peaches/Nectarines	January 1-December 31
Pears	July 1-June 30
Pistachios	September 1-August 31
Pecans	October 1-September 30
Plums, Dried	August 1- July 31
Potatoes	January 1-December 31
Prunes/Plums	January 1-December 31
Raisins	August 1- July 31
Sweet Cor	January 1-December 31
Tomaioes	January 1-December 31
Wine	January 1-December 31

Explanatory Notes on the Charts Edition:

The U.S. trade data presented in this report are available at: <http://www.fas.usda.gov/ustrade>. The U.S. Trade Internet System, located at this web link, supports the tracking of imports and exports of agricultural commodities into and out of the United States. The system allows users to generate reports that provide trade information on one or more commodity(ies) for one or more country(ies) over a user-specified time period.

The U.S. Department of Agriculture defines horticultural products to include: fresh and processed fruits, vegetables, and tree nuts; juices; wine and wine products; hops; nursery products and cut flowers; ginseng; essential oils; beer; and other miscellaneous horticultural products. For a complete listing of the products included under the definition of horticultural products, including the harmonized system (HS) codes, please refer to the "Horticultural Exports" and "Horticultural Imports" groupings under the FAS commodity aggregations of the U.S. Trade Internet System at <http://www.fas.usda.gov/ustrade>.

Much of the global trade data presented in this report were generated using The Global Trade Atlas database, provided by Global Trade Information Services, Inc. This database covers official country trade statistics for 56 countries, which account for over 90 percent of world trade in horticultural products. Information on trade by all countries, including those not captured in the Global Trade database system, is available from the Food and Agriculture Organization (FAO) of the United Nations at: <http://apps.fao.org>.

Horticultural and Tropical Products Home Page - Microsoft Internet Explorer provided by International Support Services

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FASonline

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Horticultural & Tropical Products Division

WHAT'S NEW?

Maximum Residue Limits (MRL) Databases [More](#)

Using funds provided through the Technical Assistance for Specialty Crops (TASC) Program, CropLife America and AgriChem Data Services worked with the Horticultural and Tropical Products Division to develop databases that would aid U.S. growers and exporters in the identification of MRL tolerances for Specialty crops they wish to export.

Commodity Analysis:

- [Tropical Products Circular - March 2004](#)
- [Hazelnut Situation & Outlook](#)
- [WTO Foreign Sales Corporation, Retaliation List](#)
- [Information on E.U. Retaliatory Duties on Horticultural and Tropical Products](#)
- [Avocado Situation and Outlook in Selected Countries](#)
- [Strawberry Situation and Outlook in Selected Countries](#)
- [Dried Fruit \(Dried Plum-Prune\) Situation in Selected Countries](#)
- [Raisin Situation and Outlook in Selected Countries](#)
- [Citrus Situation](#)

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ROBERT KNAPP Agricultural Economist	720-4620	Canned Deciduous Fruit and Sugar
SHARI KOSCO Agricultural Economist	720-2083	Fresh and Processed Vegetables (includes potatoes and tomatoes)
DWIGHT WILDER Agricultural Economist	690-2702	Dried Fruit, Berries, Beer/Hops, Melons, Tropical Fruit, Stone Fruit, Avocados
HEATHER VELTHUIS Agricultural Economist	720-9792	Fresh Deciduous Fruit, Table Grapes, Apple Juice

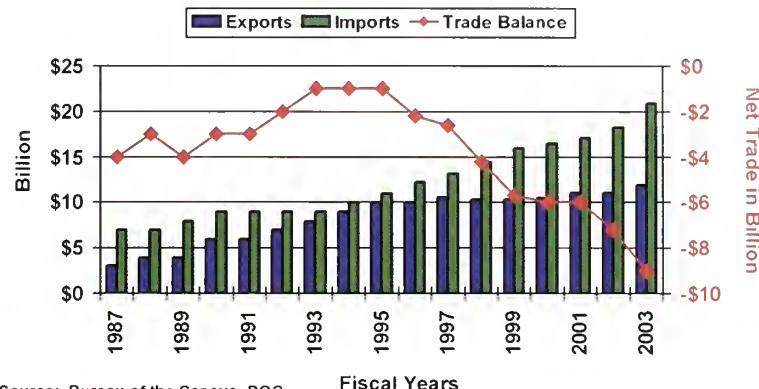
General, Regional, and Country Reports



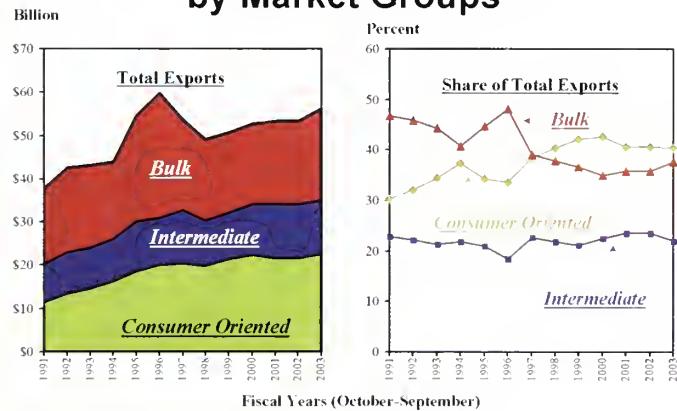
U.S. Horticultural Trade Overview

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

U.S. Horticultural Trade Balance

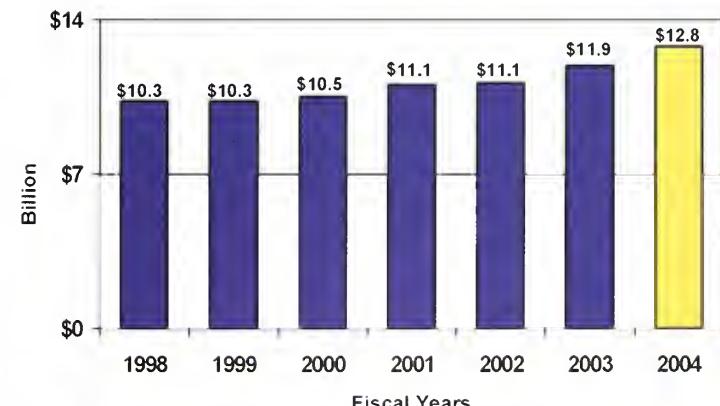


Total U.S. Agricultural Exports by Market Groups



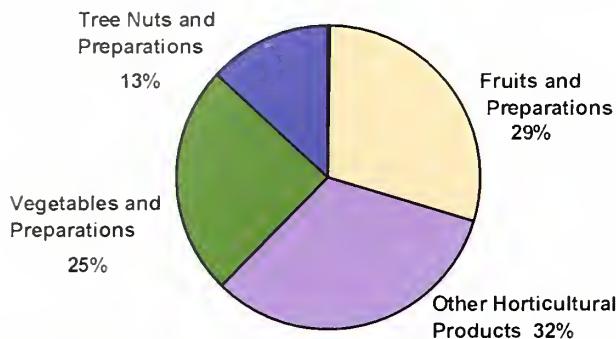
Source: Bureau of the Census, DOC

U.S. Horticultural Exports Forecast to Increase in FY 2004



Fruits & Preparations Lead Share of U.S. Horticultural Exports

Fiscal Year 2003



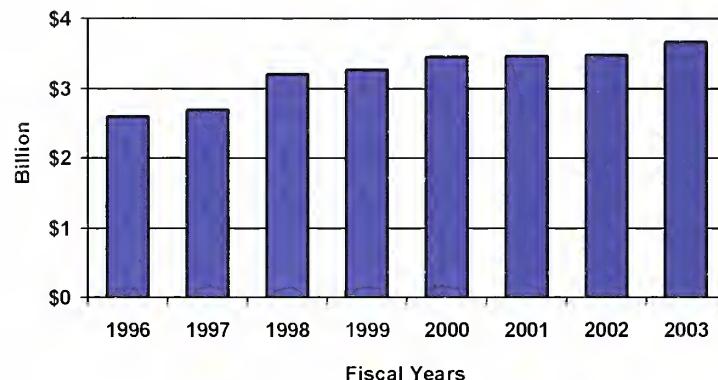
Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

U.S. Fruit Exports

(Including Fresh, Dried, Frozen, and Prepared/Preserved)

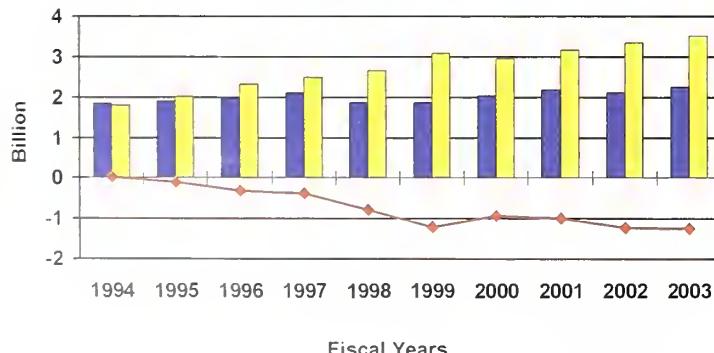


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

U.S. Trade Balance in Fresh Fruit

■ Exports ■ Imports ■ Net Trade

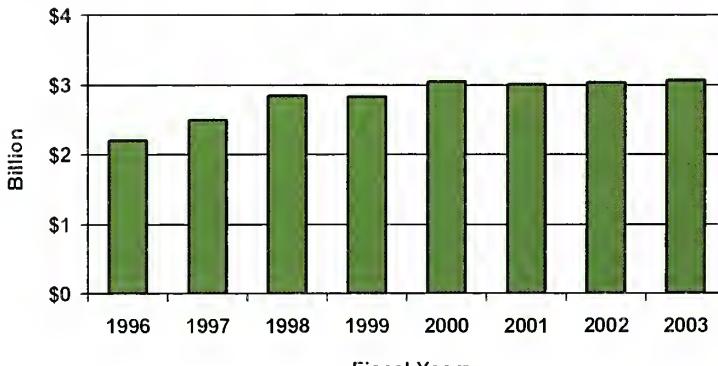


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

U.S. Vegetable Exports

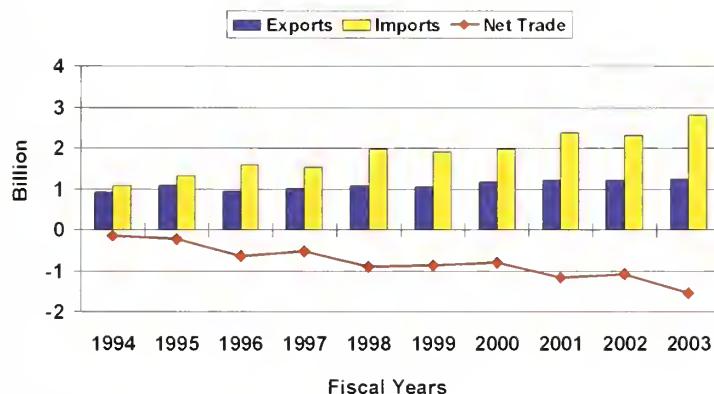
(Including Fresh, Dried, Frozen, and Prepared/Preserved)



Source: Bureau of the Census, DOC

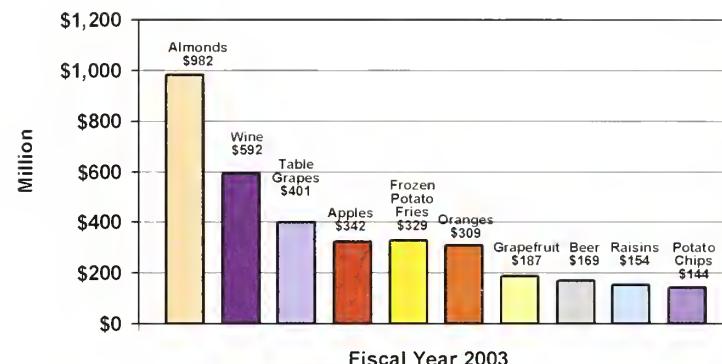
Note- U.S. fiscal year is October-September.

U.S. Trade Balance in Fresh Vegetables



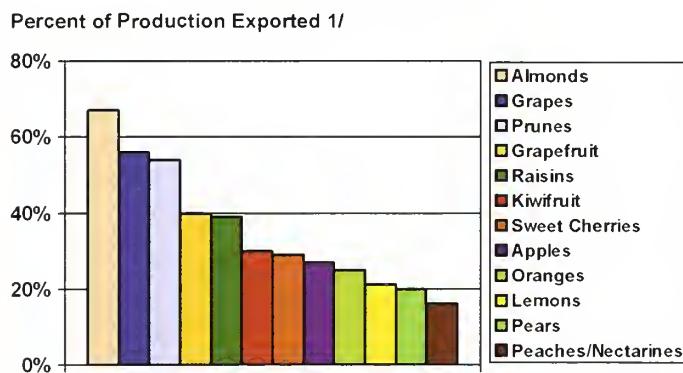
Source: Bureau of the Census, DOC
Note- U.S. fiscal year is October-September.

Top Ten U.S. Specialty Crop Exports by Value



Source: Bureau of the Census, DOC
Note- U.S. fiscal year is October-September.

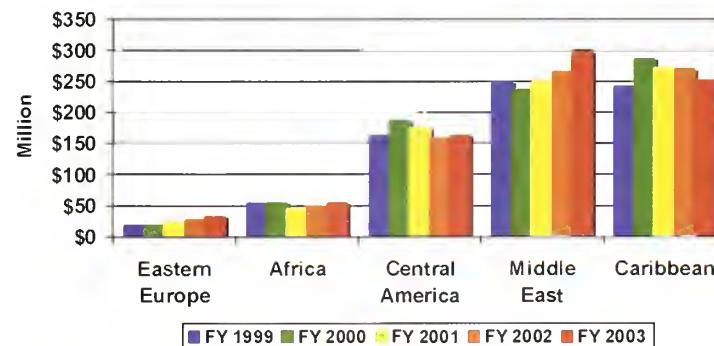
Ratio of Exports for Selected U.S. Fruits and Nuts



1/ Percentage of production exported is defined as the volume of exports divided by the volume of production for fresh use only. The volume of production going to processing is not considered in the equation. Export and for fresh use production estimates represent the average of exports and for fresh use production during marketing years 2000/01-2002/03.

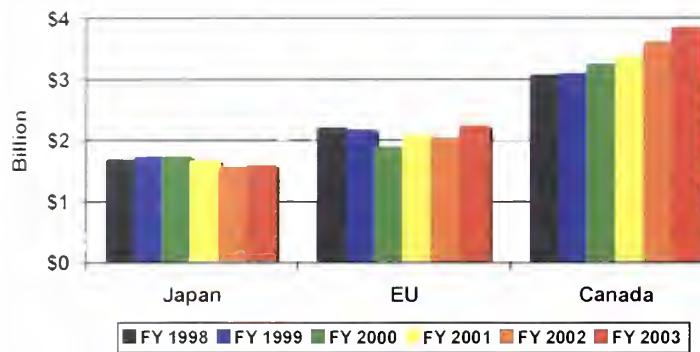
Source: Bureau of the Census, DOC

U.S. Horticultural Exports To Emerging Markets



Source: Bureau of the Census, DOC
Note- U.S. fiscal year is October-September.
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

Top Three Horticultural Export Markets

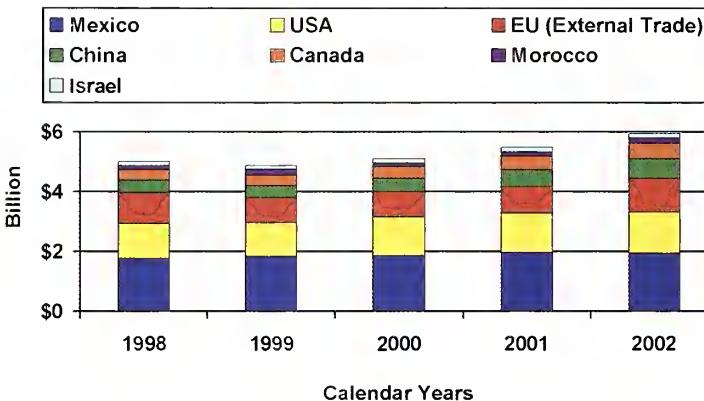


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

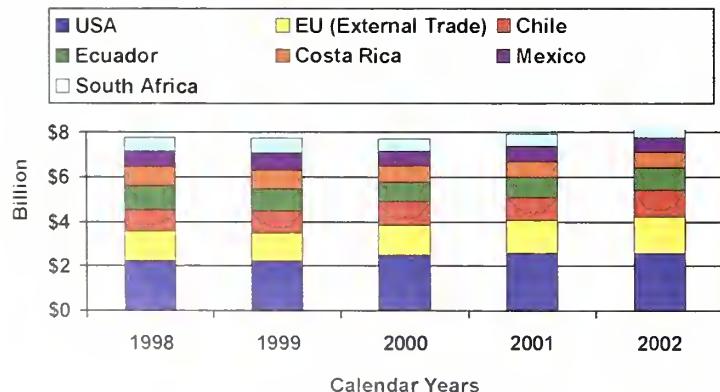
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

Top Fresh Vegetable Exporters



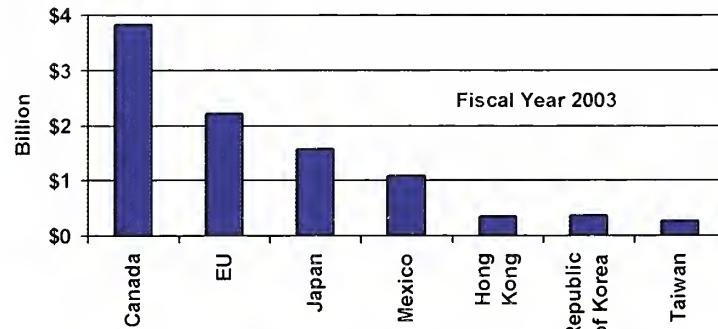
Source: Global Trade Atlas

Top Fresh Fruit Exporters



Source: Global Trade Atlas

Canada Remains Top Market for U.S. Horticultural Exports

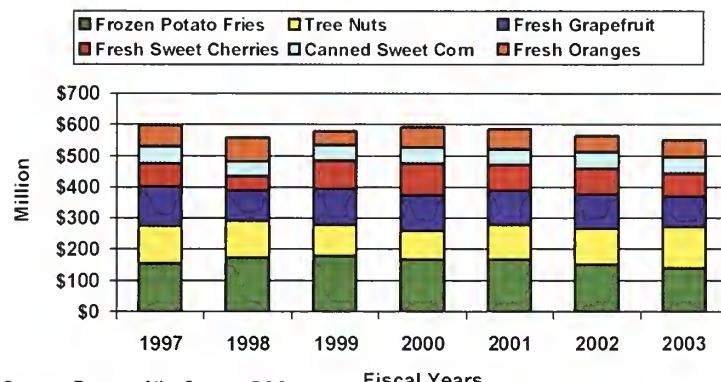


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

Top U.S. Horticultural Product Exports to Japan

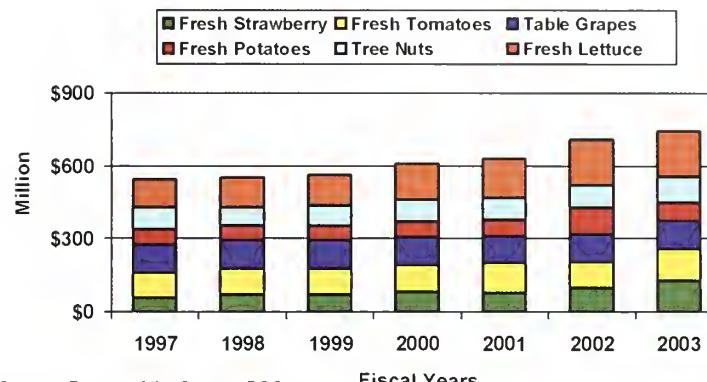


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

Top U.S. Horticultural Product Exports to Canada

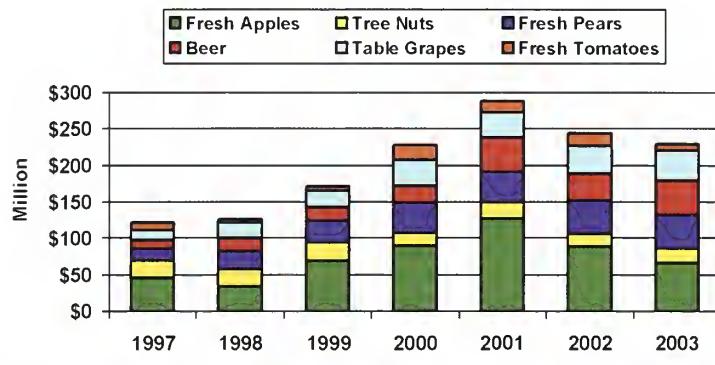


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

Top U.S. Horticultural Product Exports to Mexico

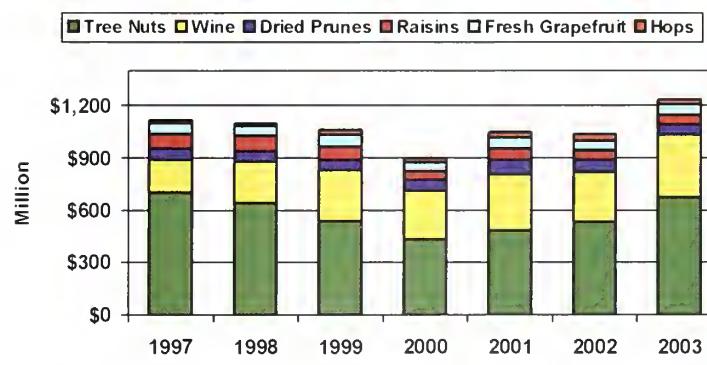


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

Top U.S. Horticultural Product Exports to the EU

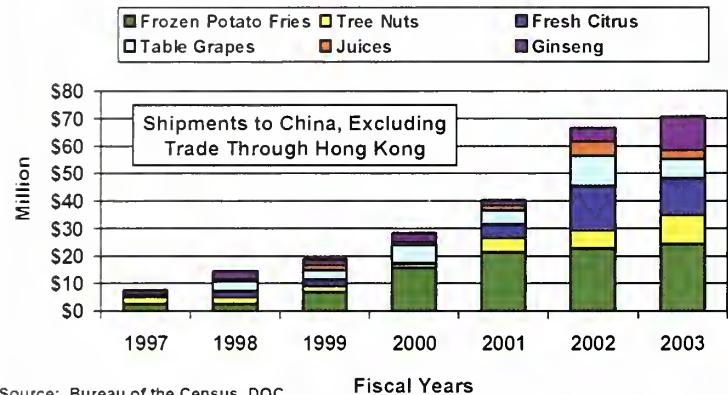


Source: Bureau of the Census, DOC

Note- U.S. fiscal year is October-September.

Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

Top U.S. Horticultural Product Exports to China



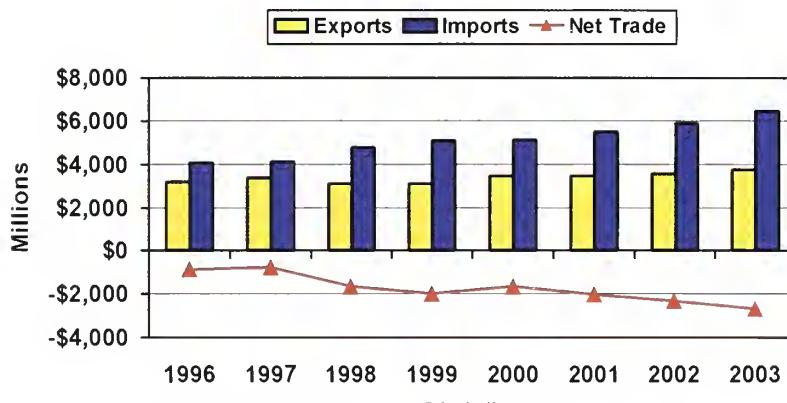
Source: Bureau of the Census, DOC
Note- U.S. fiscal year is October-September.

Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

U.S. Horticultural Import Situation

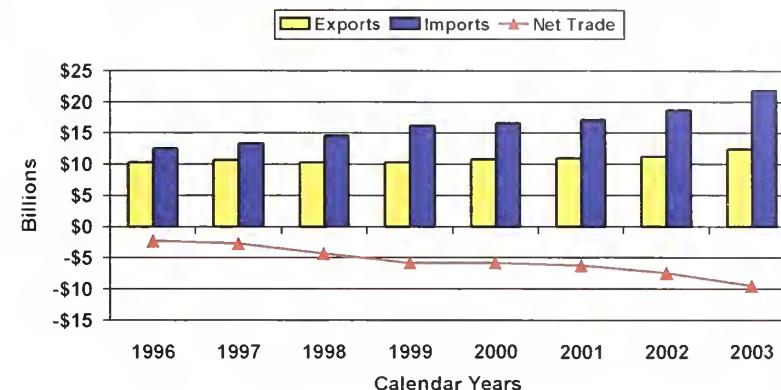
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

U.S. Trade in Fresh Fruits and Vegetables



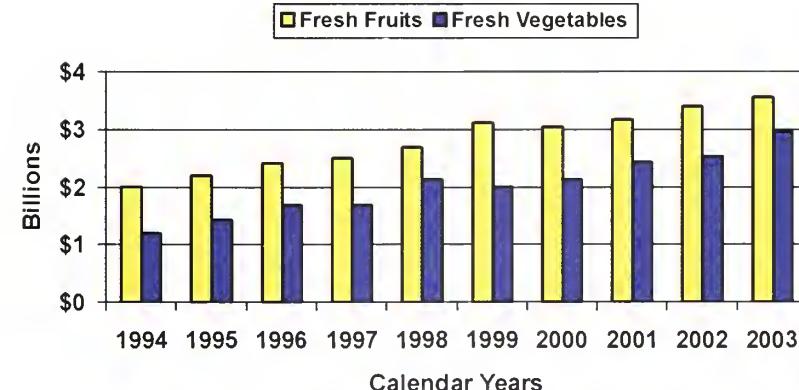
Source: Bureau of the Census, DOC

U.S. Overall Horticultural Trade



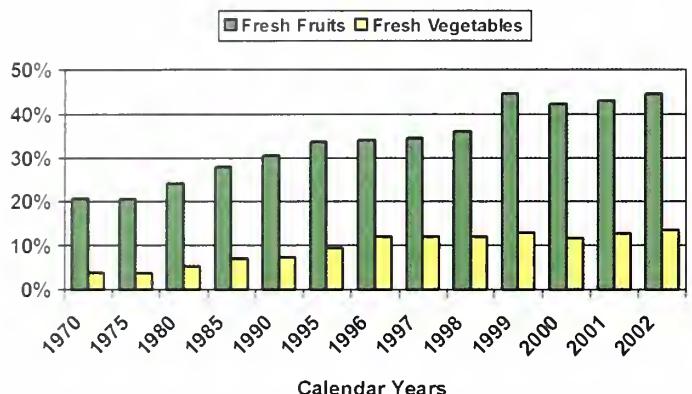
Source: Bureau of the Census, DOC
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

U.S. Imports of Fresh Fruits and Vegetables



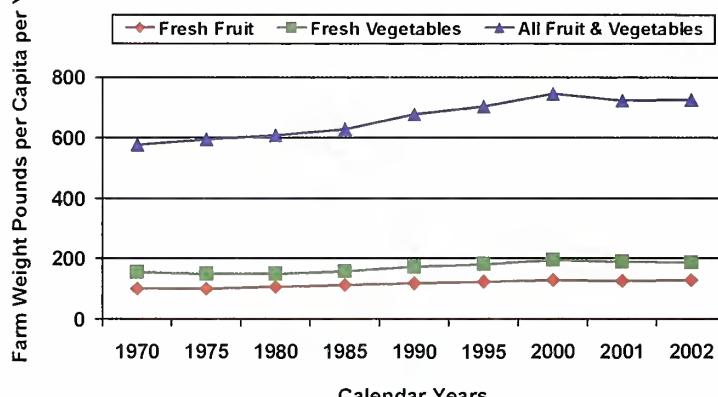
Source: Bureau of the Census, DOC

Import Share of U.S. Fruit and Vegetable Consumption



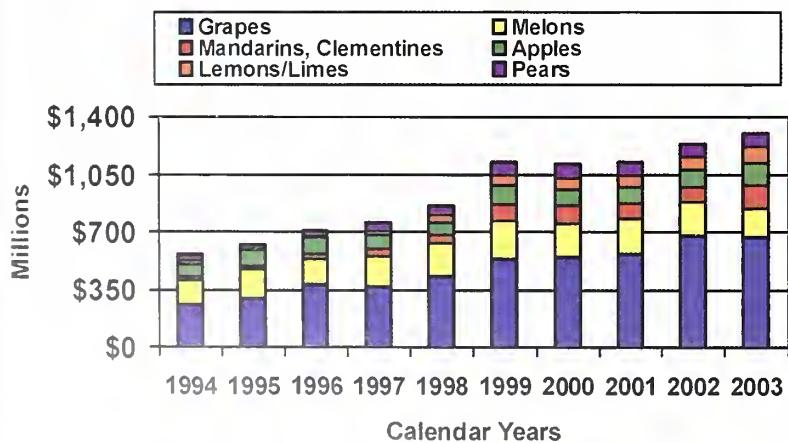
Source: Economic Research Service, USDA

U.S. Per Capita Consumption of Fresh Fruits and Vegetables



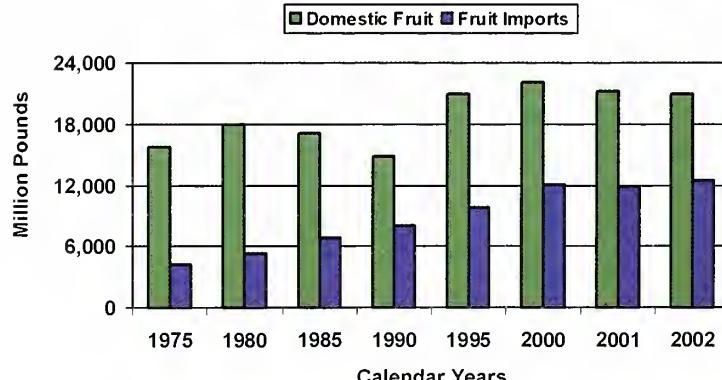
Source: Economic Research Service, USDA

U.S. Imports of Selected Fresh Fruits



Source: Bureau of the Census, DOC

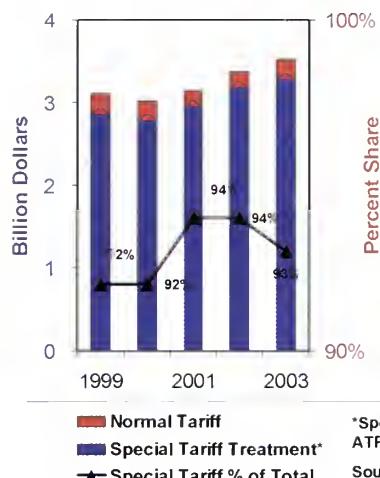
Import Share of U.S. Fresh Fruit Consumption



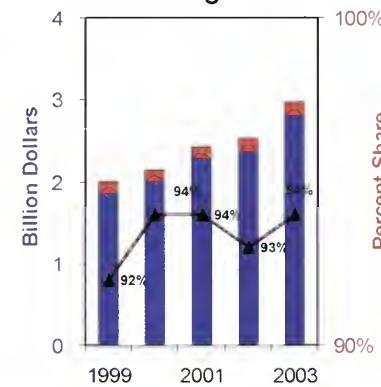
Source: Economic Research Service, USDA
Note: Excludes melons.

Percent of Imports With Zero Duties or Special Treatment

Fresh Fruits



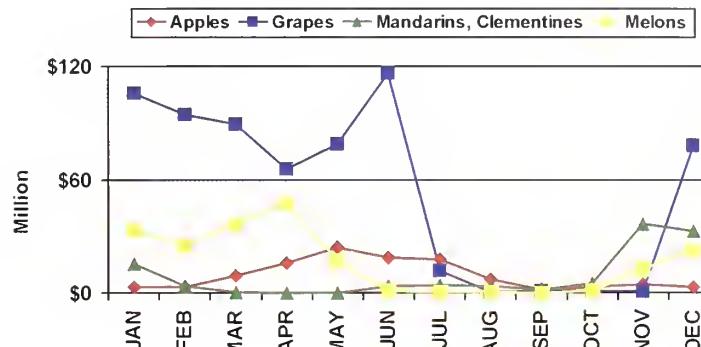
Fresh Vegetables



*Special Treatment = GSP, NAFTA, AGOA, CBI, ATPA, FTAs: Israel, Jordan, Singapore, Chile

Source: Bureau of the Census, DOC and TSUSA

U.S. Monthly Imports of Selected Fresh Fruits

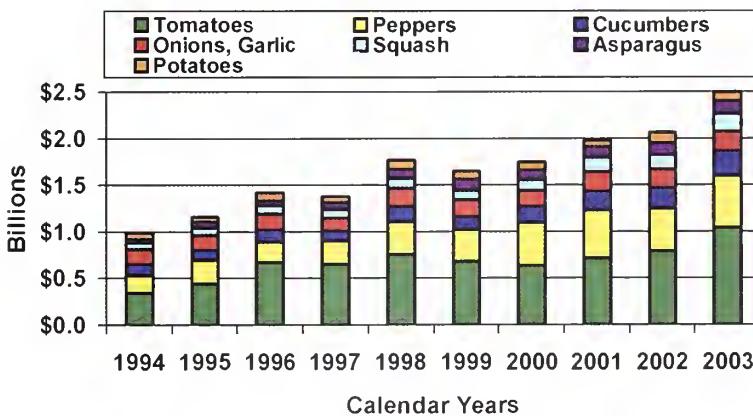


Source: Bureau of the Census, DOC
Note- Average monthly during 2001-2003.

Fruit Import Highlights

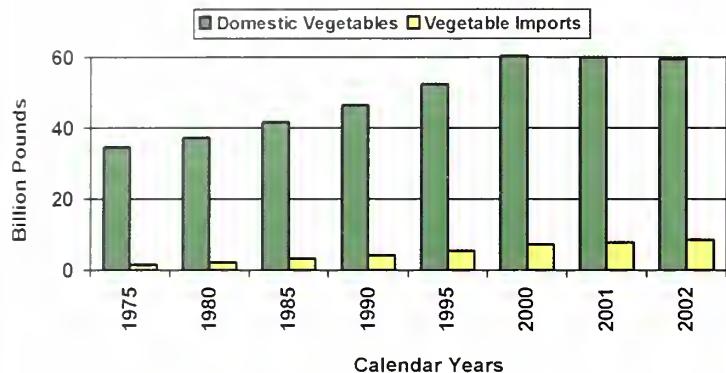
- Fruit imports have grown considerably, particularly grapes and melons. Imports of these products follow a highly seasonal pattern, peaking in the late fall through early spring and dropping to very low levels during June through October.
- Latin America is the primary supplier of fresh and frozen fruit.
- Grapes:** Imports rose 156 percent during the 1994-2003 period. While most grape imports are during the U.S. off-season, there is substantial competition between imports and U.S. grapes during the U.S. marketing season. (Chile is the predominant supplier, followed by Mexico.)
- Melons:** Imports rose 90 percent during the 1994-2003 period. Despite the seasonality of imports, there is substantial competition between imports and domestically produced melons during the U.S. marketing season. Growing consumption has outpaced growing production of melons. (Mexico is the predominant supplier, followed by Central American countries.)
- Citrus:** Imports of fresh mandarins and clementines rose from \$20 million in 1994 to \$140 million in 2003, peaking during the months of Nov.-Jan. in competition with U.S. citrus. Spain is the predominant supplier, followed by Morocco and South Africa.

U.S. Imports of Selected Fresh Vegetables



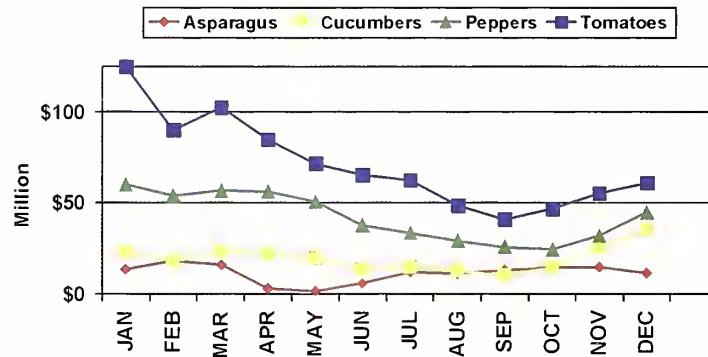
Source: Bureau of the Census, DOC

Import Share of U.S. Fresh Vegetable Consumption



Source: Economic Research Service, USDA
Note- Includes potatoes and melons.

U.S. Monthly Imports of Selected Fresh Vegetables



Source: Bureau of the Census, DOC
Note- Average monthly during 2001-2003.

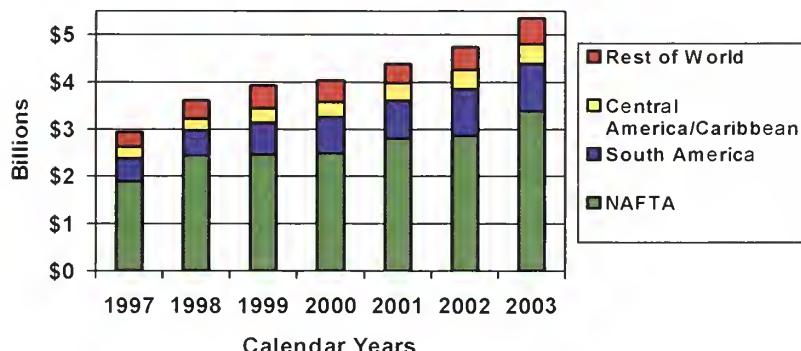
Fresh Vegetable Import Highlights

- Imports of fresh vegetables have grown considerably in the past 10 years (1994-2003), particularly peppers (up 184 percent), cucumbers (up 146 percent), squash (up 173 percent), and asparagus (up 230 percent). Imports are highly seasonal, with two-thirds arriving between December and April, when U.S. production is limited. Most of these are warm season crops, including tomatoes, peppers, squash, and cucumbers.
- Vegetable imports are dominated by Mexico, with an average 69 percent share, followed by Canada, with a 15 percent share, and the Netherlands, with a 5 percent share.
- Tomatoes: Imports rose from \$344 million in 1994 to over \$1 billion in 2003. A high percentage of tomato imports compete head-to-head with U.S. product, leading to significant trade disputes. Mexico is by far the largest supplier, followed by Canada and the Netherlands.

Fresh Vegetable Import Highlights

- Peppers: Imports rose from \$193 million in 1994 to \$547 million in 2003, accounting for a growing share of domestic consumption. Mexico is the predominant supplier, followed by Canada and the Netherlands. Imports from Mexico have accounted for almost all of the phenomenal growth. Imports peak in the winter before the U.S. marketing season begins in July.
- Squash: Imports rose from \$65 million in 1995 to \$178 million 2003. Mexico is the predominant supplier, accounting for 97 percent of imports in 2003.
- Asparagus: Imports of fresh asparagus have grown from \$45 million in 1994 to \$149 million in 2003, as U.S. fresh consumption has grown from about 70,000 tons to close to 120,000 tons. While 95 percent of imports take place during the off-season, over the last five years, Peruvian asparagus is increasingly infringing on Washington's production season, especially in June, when Washington traditionally receives its highest prices for asparagus. Mexico and Peru are the predominant suppliers.

U.S. Fresh Fruit & Vegetable Imports from Western Hemisphere and Rest of World



U.S. Horticultural Imports Overview

- Over the period 1994-2003, U.S. imports of horticultural products increased 121 percent (from \$9.9 billion to \$21.9 billion). In contrast, U.S. exports of horticultural products over the same period expanded by 36 percent (rising from \$9.1 billion to \$12.3 billion).
- Import penetration in the U.S. fruit and vegetable industry has increased significantly in recent years. Imports of fresh fruit rose from 31 percent of fresh domestic consumption in 1990 to 44 percent in 2002.** Excluding bananas and melons, imports of fresh fruit rose from 11.6 percent to 19 percent of fresh domestic consumption during the same period.
- Tropical fruit consumption has been rising significantly at the same time as domestic production has been falling. In this regard, Mexico supplies almost all of the mangos, papayas, and limes consumed in the United States. (Economic Research Service data)
- Imports of fresh vegetables rose from 7.5 percent of fresh domestic consumption in 1990 to 13.5 percent in 2002**
- Most imports of horticultural products (with some notable exceptions, such as EU wine and India cashews) are sourced from Western Hemisphere suppliers, most notably the NAFTA partners of Mexico and Canada

Key Factors Behind The Rise In Imports

- Relatively open U.S. import regime (U.S. agricultural tariffs average 12 percent compared with the global average of 62 percent). More than 90 percent of fresh fruit and vegetable imports benefit from zero duties or special tariff treatment.
- The U.S. population grew from about 253 million in 1991 to 280 million in 2001.
- U.S. GDP per capita rose from \$24,000 in 1991 to about \$35,000 in 2001.
- Evolving consumer preferences, including, for example, increased demand for year-round availability of fresh fruits and vegetables. Total per capita use of fruits and vegetables rose 19 percent from 1982 to 1997 (ERS data on 129 products)
- Increased consumer awareness of the role that fruits and vegetables play in a healthy diet (e.g., 5-a-Day for Better Health).
- Supermarkets now carry over 400 produce items compared with 250 in the late 1980's.
- Increased consumption of wine for health and social reasons.

Key Factors Limiting Export Growth

- Many countries continue to maintain **restrictive market access policies**, primarily in the form of high tariffs.
- Increased competition**, as many countries have raised levels of horticultural production by providing direct and indirect subsidies and other support.
- Economic slowdown** in key consuming countries, such as Japan.

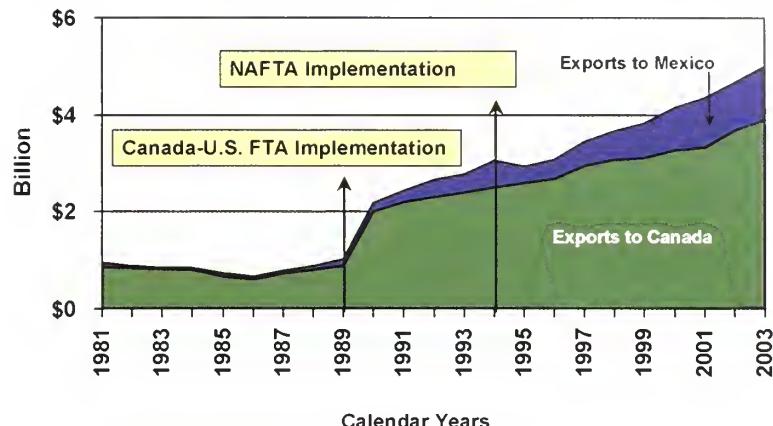
Benefits Of Further Trade Liberalization

- Despite the growing trade imbalance, the United States would benefit from lower trade barriers through new and expanded export opportunities for its growers, processors and exporters.
- A more open world trade regime would serve to increase world access to other key markets, lessening reliance by foreign suppliers on the U.S. market, which can be seen within the current global trading environment as essentially being "the only game in town."
- U.S. exports of horticultural products are destined primarily to countries outside of the FTAA. Negotiations to lower tariff barriers in these countries would create substantial growth opportunities for U.S. exports.

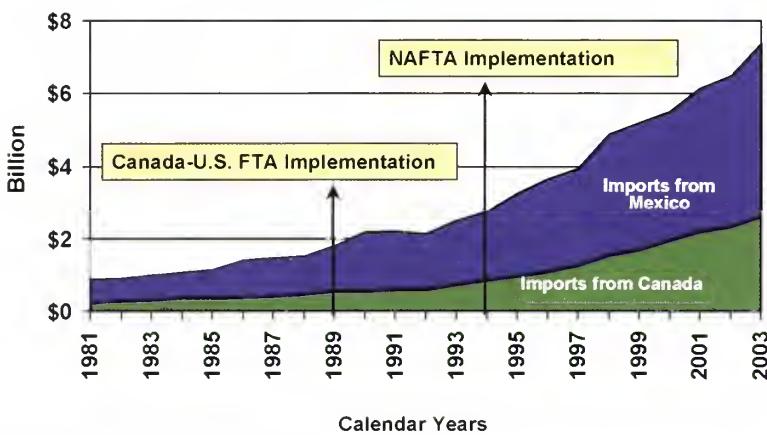
U.S. Horticultural Trade Trends Under NAFTA

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

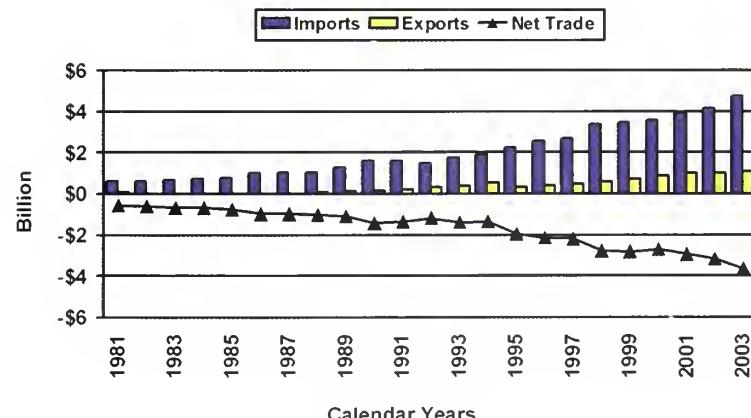
U.S. Horticultural Exports to NAFTA Countries



U.S. Horticultural Imports from NAFTA Countries



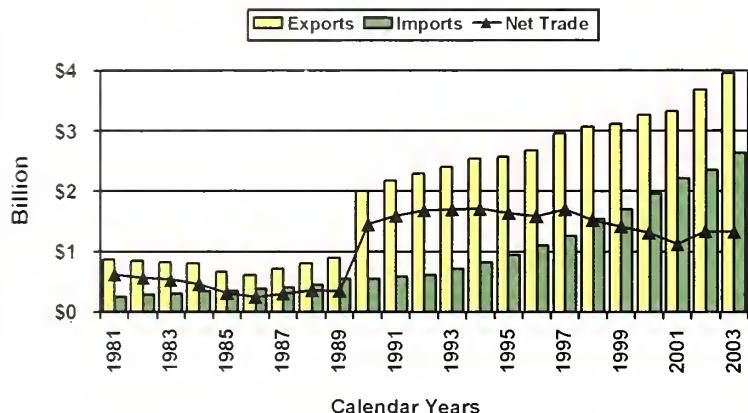
U.S. Horticultural Trade Balance with Mexico



Source: Bureau of the Census, DOC

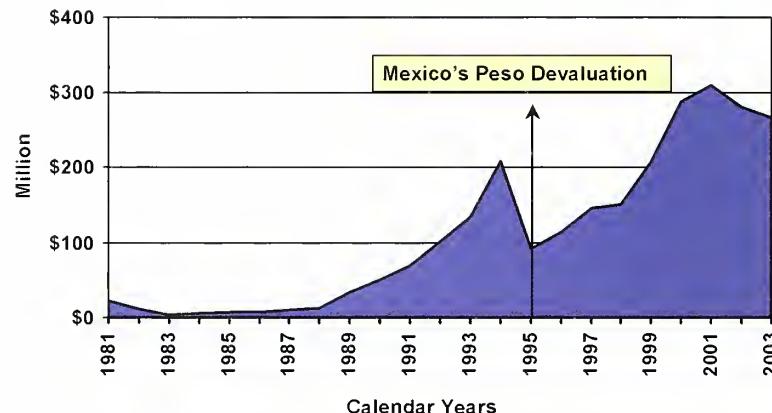
Source: Bureau of the Census, DOC

U.S. Horticultural Trade Balance with Canada



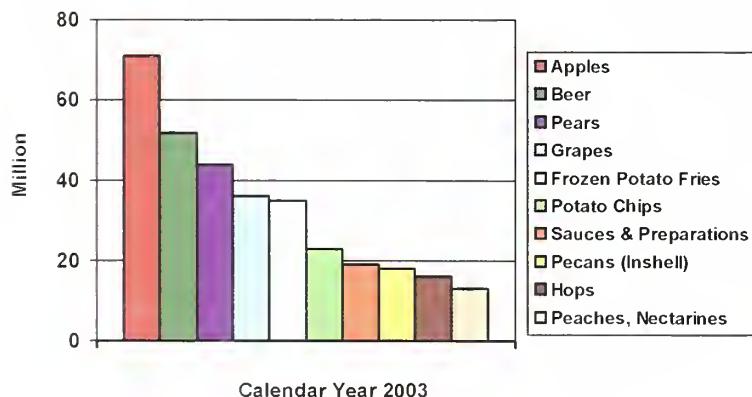
Source: U.S. Department of Commerce, Bureau of the Census

U.S. Fresh Fruit & Vegetable Exports to Mexico



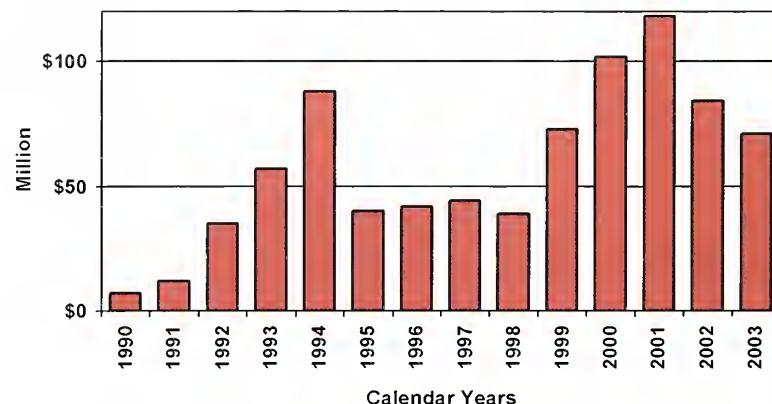
Source: Bureau of the Census, DOC

Top U.S. Horticultural Products Exported to Mexico in 2003



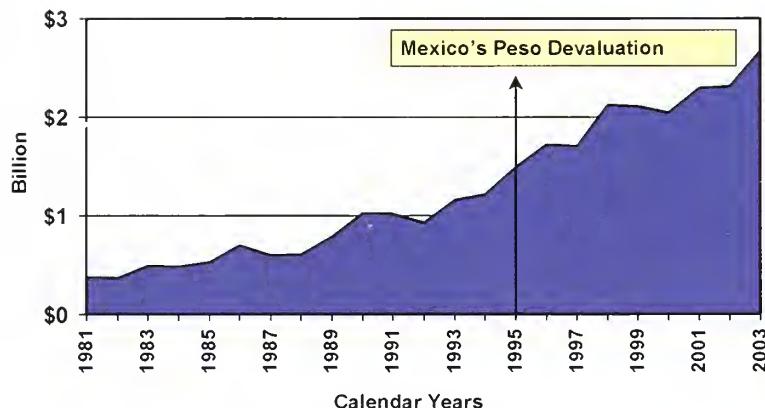
Source: Bureau of the Census, DOC

U.S. Apple Exports to Mexico



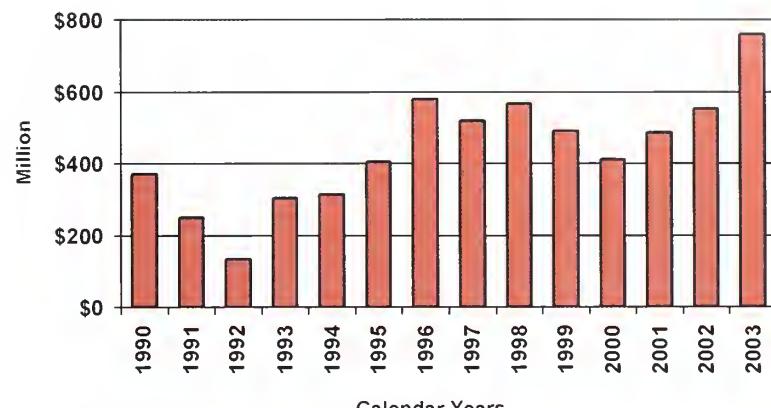
Source: Bureau of the Census, DOC

U.S. Fresh Fruit & Vegetable Imports from Mexico



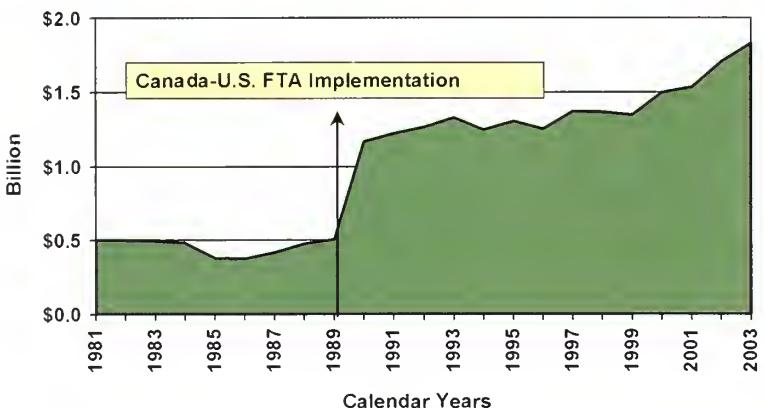
Source: Bureau of the Census, DOC

U.S. Tomato Imports from Mexico



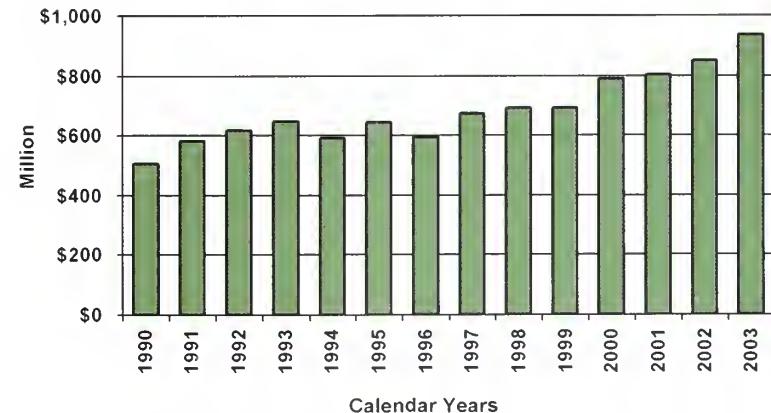
Source: Bureau of the Census, DOC

U.S. Fresh Fruit & Vegetable Exports to Canada



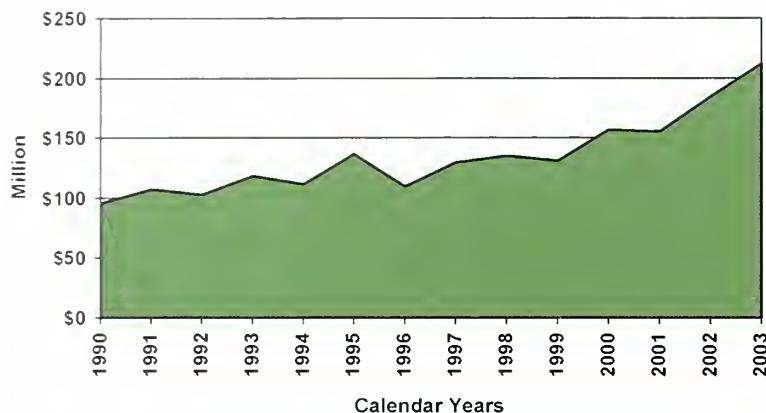
Source: Bureau of the Census, DOC

U.S. Fresh Vegetable Exports to Canada

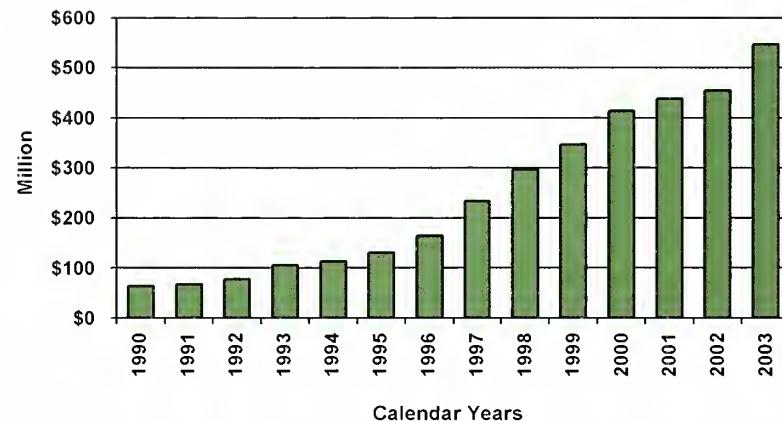


Source: Bureau of the Census, DOC

U.S. Fresh Lettuce Exports to Canada



U.S. Frozen Vegetable Imports from Canada



Source: Bureau of the Census, DOC

Source: Bureau of the Census, DOC

2004 Applied Tariff Rates Selected Countries and Selected Commodities

Commodity HS # (s)	Oranges 080510	Grapefruit 080540	Lemons 80550	FCOJ 200911	OJ, nt frz 200919 *	Apples 080810	Pears 080820
<i>Country</i>							
NAFTA							
United States	2.1	16.2-28.7	4.4	39	17.1	0	0-0.40 1/
Canada	0	0	0	0	0	0	0-8
Mexico	0	0	0	20 3/	1.76 cents/liter	0 4/	0
WESTERN HEMISPHERE							
Argentina	11.5	11.5	11.5	15.5	15.5	11.5	11.5
Brazil	10	10	10	14	14	10	10
Chile	0	0	0	0	0	0	0
Venezuela	15	15	15	20	20	15	15
EUROPE							
European Union	3.2-16.0 5/	1.5-2.4	6.4 6/	33.6 7/	33.6 7/	4.0-11.2 8/	5-10.4 8/
MIDDLE EAST							
Israel	OQ NS0.63/kg BNM145.8%	OQ NS0.56/kg BNM145.8%	OQ NS0.69/kg BNM221.4%	OQ 10.8%+17%VAT	OQ 10.8%+17%VAT	OQ NS1.65/kg BNM498%	OQ NS1.84/kg BNM394.2%
Kuwait	0	0	0	5	5	0	0
Saudi Arabia	5	5	5	5	5	5	5
Turkey	54.0	54.0	54.0	58.5	58.5	60.3	60.3
AFRICA							
Egypt	40	40	40	40	40	40	40
South Africa	5	5	5	25	25	5	5
ASIA							
China	11 + 13 VAT	12 + 13 VAT	11 + 13 VAT	7.5 + 17 VAT	30 + 17 VAT	10 + 13 VAT	10 - 12 + 13 VAT
Hong Kong	0	0	0	0	0	0	0
India	30	25	30	30	30	50	30
Indonesia	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT + 10 STL	5 + 10 VAT + 10 STL	5 + 10 VAT	5 + 10 VAT
Japan	16-32 10/	10	free	25.5	25.5	17	4.8
Korea, Republic of	50	30	30	OQ-54 + 10 VAT	OQ-54 + 10 VAT	45	45
Australia	free	free	free	5	5	free	free
Malaysia	0	5	5	6	6	5	5
New Zealand	0	0	0	5.0-6.5/liter	5.0-6.5/liter	0	0
Philippines	10	7	10	7	1	7	7
Singapore	0	0	0	0	0	0	0
Taiwan	20*	15*	15*	21.5~29.0	22.5~30.0	20	10
Thailand	30 CIF value or 25.00 B/kg 20/	40 CIF value or 33.50 B/kg 20/	40 CIF value or 33.50 B/kg 20/	30 CIF value or 10 B/liter + 7 VAT 20/	30 CIF value or 10 B/liter + 7 VAT 20/	10 CIF value or 3 B/kg 20/	30 CIF value or 25.00 B/kg 20/

The information contained in these tables is drawn from a variety of sources and is intended for illustrative purposes.
Accuracy of the individual entries is not guaranteed.

Note 1: IQ means In-Quota Tariff. OQ means Out-Of-Quota Tariff. VAT means Value Added Tax. EXT means Excise Tax.

Note 2: Sole numbers (without further description or details) means or refer to the applied tariff in percent.

Note 3: Shaded areas represent import tariffs higher than the United States.

* 200912 Orange Juice, not frozen, of a brix value not exceeding 20 has not been separately reported in this exercise.

1/ 0.30 if entered during the period 7/1-3/31

3/ the lesser of 20 percent ad valorem or \$0.0786/liter, with import permit \$0.0462

4/ antidumping duties for U.S. Red and Golden Delicious apples of 46.58%.

5/ plus entry price during the period 12/1-5/31: max 71 EUR/ton

6/ plus entry price: max 256 EUR/ton

7/ plus 206 EUR/ton

8/ plus entry price: max 238 EUR/ton

9/ plus entry price: max 274 EUR/ton

10/ 32 during the period 12/1-5/31 and 16 during the period 6/1-11/30

20/ B = Baht, which is the Thai currency.

2004 Applied Tariff Rates Selected Countries and Selected Commodities

Commodity HS # (s)	Cherries 080920	Peach/Nect 080930	Strawberry 081010	Grapes 080610	Almonds ns 080211	Almonds sh 080212
COUNTRY						
NAFTA						
United States	0	0-0.24	2/	0.13-1.67	\$1.13-1.80/cubic meter	4.1
Canada	0-8	0-8	0-8.5	0-1.41 cents/kg	0	0
Mexico	0	0	0	0	0	0
WESTERN HEMISPHERE						
Argentina	11.5	11.5	11.5	11.5	11.5	11.5
Brazil	10	10	10	10	10	10
Chile	0	0	0	0	0	0
Venezuela	15	15	15	15	15	15
EUROPE						
European Union	12 9/	17.6 12/	11.2-12.8	11.5-17.6 13/	5.6	3.5
MIDDLE EAST						
Israel (*)	Released Apr-July: NS3.30/kg OQ Apr. -Nov.: NS1.18/kg BNM72.9%; Aug. - March: BNM 80.1%; Dec.-March: NS1.55/kg BNM72.9% NS.75/kg BNM 80.1%		Oct. -May: NS3.78/kg BNM 84.6%; June - Sept.: NS1.22/kg BNM84.6%		OQ NS8.10/kg BNM91.8+17%VAT	OQ NS14.40/kg BNM91.8%+17%VAT
Kuwait	0	0	0	0	5	5
Saudi Arabia	5.0	5.0	5.0	5.0	5.0	5.0
Turkey	55.0	55.0	55.0	54.9	43.2	43.2
AFRICA						
Egypt	40	40	40	40	30	30
South Africa	5	5	15	5	0	0
ASIA						
China	10 + 13 VAT	10 + 13 VAT	22.7 + 13 VAT	13 + 13 VAT	24 + 13 VAT	10 + 13 VAT
Hong Kong	0	0	0	0	0	0
India	30	30	30	30	Rs 35/kg	Rs 65/kg
Indonesia	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT
Japan	8.5	6	6	17 - 7.8 15/	free - 2.4 16/	free - 2.4 16/
Korea, Republic of	24	45	45	45	8	8
Australia	free	free	free	5	5	5
Malaysia	5	5	5	5	0	0
New Zealand	0	0	0	0	0	0
Philippines	7	7	15	7	3	3
Singapore	0	0	0	0	0	0
Taiwan	7.5	20	20	20	5	2.5
Thailand	40 CIF value or 33.50B/kg 20/	40 CIF value or 33.50B/kg 20/	40 CIF value or 33.50B/kg 20/	30 CIF value or 25.00B/kg 20/	10 CIF value or 8.50B/kg 20/	10 CIF value or 8.50B/kg 20/

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Note 1: IQ means In-Quota Tariff. OQ means Out-Of-Quota Tariff. VAT means Value Added Tax. EXT means Excise Tax.

Note 2: Sole numbers (without further description or details) means or refer to the applied tariff in percent.

Note 3 Shaded areas represent import tariffs higher than the United States.

2/ 0.10 percent if entered during the period 6/1-11/30

11/ plus 0.12-0.33 EUR/kg

12/ plus entry price during the period 6/1-9/30: max 130 EUR/ton

13/ plus entry price during the period 7/21-11/20: max 96 EUR/ton

20/ B = Baht, which is the Thai currency.

2004 Applied Tariff Rates Selected Countries and Selected Commodities

Commodity HS # (s)	Pistachios 080250	Walnuts 08023	Corn p/p 200580	Broccoli 070410	Lettuce 070511	Tomatoes 070200
Country						
NAFTA						
United States	0.24-0.34	6-8.85	5.6	2.5-14.0	0.88-7.62	2.51
Canada	0	0	0-10.5	0-4.0	0-12.5	0-4.8
Mexico	0	0	72.6*	0	0	0
WESTERN HEMISPHERE						
Argentina	11.5	11.5	15.5	11.5	11.5	11.5
Brazil	10	10	14	10	10	10
Chile	0	0	0	0	0	0
Venezuela	15	15	20	15	15	15
EUROPE						
European Union	1.6	5.1	5.1 + 94 EUR/Ton	9.6-13.6	14/	10.4-12 15/
MIDDLE EAST						
Israel	0 + 17%VAT	0+17% VAT	10.8%+NS0.86/kg BNM45%+17% VAT	OQ NS1.08/kg BNM115.2%	0.62/kg BNM80%	OQ June-Oct.: NS0.81/kg BNM 244.8%; Nov. - May: NS1.09/kg BNM 244.8%
Kuwait	5	5	5	0	0	0
Saudi Arabia	5.0	5.0	5.0	5.0	5.0	5.0
Turkey	43.2	43.2	5.1%+22.9EUR/100 Kg./net	19.5	19.5	48.6
AFRICA						
Egypt	30	30	30	20	20	20
South Africa	0	0	20	0	0	15
ASIA						
China	10 + 13 VAT	20-25 + 13 VAT	10 + 17 VAT	10 + 13 VAT	10 + 13 VAT	13 + 13 VAT
Hong Kong	0	0	0	0	0	0
India	30	30	30	30	30	30
Indonesia	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT	5 + 10 VAT
Japan	0	10	14.9 - 10 19/	3	3	3
Korea, Republic of	30	45 in-shell; 30 shelled	15 + 10 VAT	27	45	45
Australia	free	free	5	free	free	free
Malaysia	0	0	8	0	0	0
New Zealand	0	0	7	0	0	0
Philippines	3	3	15	25	25	10
Singapore	0	0	0	0	0	0
Taiwan	3	5	13~20	20	20	10
Thailand	10 CIF value or 8.50B/kg 20/	10 CIF value or 8.50B/kg 20/	30 CIF value or 25B/kg + 7 VAT	20/	40 CIF value or 4.18B/kg 20/	40 CIF value or 4.18B/kg 20/

The information contained in these tables is drawn from a variety of sources and is intended for illustrative purposes. Accuracy of the individual entries is not guaranteed.

Note 1: IQ means In-Quota Tariff. OQ means Out-Of-Quota Tariff. VAT means Value Added Tax. EXT means Excise Tax.

Note 2: Sole numbers (without further description or details) means or refer to the applied tariff in percent.

Note 3: Shaded areas represent import tariffs higher than the United States.

14/ from 1/1-14 and 12/1-31: 96 percent of the cif value, minimum of 1.6 Eu per 100 kg/net and 4/15-11/30: 13.6 percent, minimum of 1.6 EUR per 100 kg/net

15/ from 1/1-3/31 and 12/31: 10.4 percent minimum 1.3 EUR per 100kg/gross; and 4/1-11/30: 12 percent , minimum 2 EUR per 100 kilograms

16/ plus entry price: 298 EUR/ton

17/ plus 0.25-0.45 Eur/kg

20/ B = Baht, which is the Thai currency.

2004 Applied Tariff Rates Selected Countries and Selected Commodities

Commodity HS # (s)	Raisins 080620	Prunes 081320	Wine 22042	Potato x sd 070190	Potato chip 200520	Frz f/f 200410
COUNTRY						
NAFTA						
United States	1.08-2.29	14	1.1-19.6	1.5-3.1	6.4	6.4-8.0
Canada	0	0	3.74-16.22 cents/liter	0-\$4.94/metric ton	0-6	0-6
Mexico	0	0	0**	0	0	0
WESTERN HEMISPHERE						
Argentina	11.5	11.5	21.5	11.5	15.5	15.5
Brazil	10	10	20	10	14	14
Chile	0	0	6	4.5	4.5	4.5
Venezuela	15	15	15-20	15	20	20
EUROPE						
European Union	2.4	9.6	13.1-32 EUR per hl	9.6-13.4	14.1	17.6
MIDDLE EAST						
Israel	OQ NS6.30/kg BNM 0813.2091 OQ NS0.90/kg 306%+17%VAT BNM27%+17%VAT	OQ 9.0%+NS1.01/liter BNL NS4.50/liter+17% VAT	OQ July-Apr.: NS1.59/kg BNM 207%; May-June: NS1.34/kg BNM 207%	10.8%+17% VAT	OQ 10.8%+NS2.65/kg BNM 45%, BNL NS2.00/kg+17%VAT	
Kuwait	0	5	Not Allowed	5	5	5
Saudi Arabia	5.0	5.0	5.0	5.0	12.0	5.0
Turkey	54.9	41.0	70.0	19.3	39.0	39.0
AFRICA						
Egypt	40	40	1800	20	30	30
South Africa	10	10	25	0.44 c/kg	20	20
ASIA						
China	10 + 13 VAT	25 + 13 VAT	14 - 20 + 17 VAT	13 + 13 VAT	15 + 17 VAT	13 + 17 VAT
Hong Kong	0	0	80	0	0	0
India	100	25	see India note	30	30	30
Indonesia	5 + 10 VAT	5 + 10 VAT	75 STL	5	5 + 10 VAT	5 + 10 VAT
Japan	1.2	2.4	15	4.3	13.6	8.5
Korea, Republic of	21 + 10 VAT	18 (Dried)	15 + 10 VAT	IQ-30 OQ-304	20 + 10 VAT	18 + 10 VAT
Australia	5	5	5	free	free	5
Malaysia	5	5	Rm 66/decaliter + EXT Rm 66/decaliter	0	0	0
New Zealand	0	0	7	0	5	5
Philippines	3	7	7	IQ-40 OQ-40	7	10
Singapore	0	0	EXT S\$9.50 per liter	0	0	0
Taiwan	NT\$2/kg	6.9	10	20	15	12.5
Thailand	30 CIF value or 25B/kg 20/	40 CIF value or 33.50B/kg 20/	54 CIF value or 18.00B/liter + 60 EXT + 10 Municiple Tax + 2 Health Tax + 7 VAT 20/	OQ, 125 CIF value	30 CIF value or 25B/kg + 7 VAT 20/	30 CIF value or 25.0B/kg + 7 VAT 20/

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Note 2: Sole numbers (without further description or details) means or refer to the applied tariff in percent.

Note 3: Shaded areas represent import tariffs higher than the United States.

18/ plus minimum 25 EUR/hl

19/ plus maximum 0.09 EUR/kg

20/ B - Baht, which is the Thai currency.

India Note: Total applicable duty on wine ranges from 140 to 250 percent on advalorem value that includes:

/1: Basic Duty applicable on CIF value of the good = 100 percent

/2 : Countervailing Duty (CVD): applied on the CIF Value plus Basic Duty

75% for CIF value not exceeding \$25 per case (case is package of total volume 9 liters of liquor)

50% or \$37 per case whichever is higher for CIF value more than \$25 but less than \$40 per case

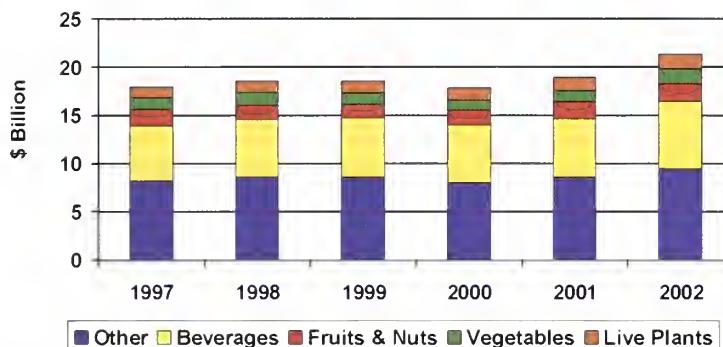
20% or \$40 per case whichever is higher for CIF value exceeding \$40 per case

/3: Total Effective Duty = Total Basic Duty + Total CVD

EU Horticultural Exports: A Global View

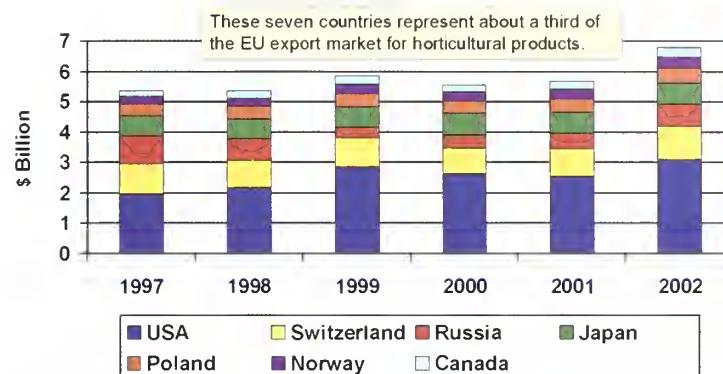
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

EU Exports of Horticultural Products by Category



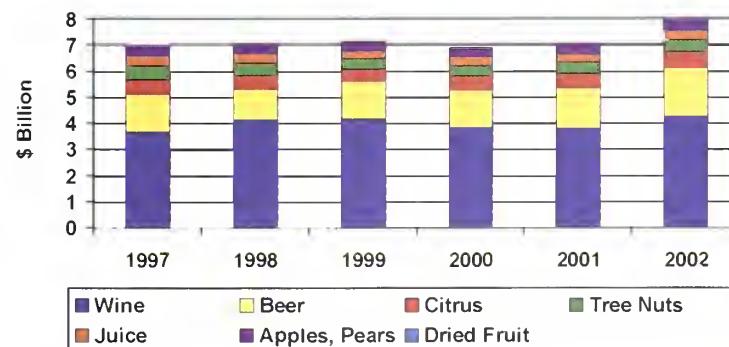
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

EU Horticultural Product Exports to Top Markets



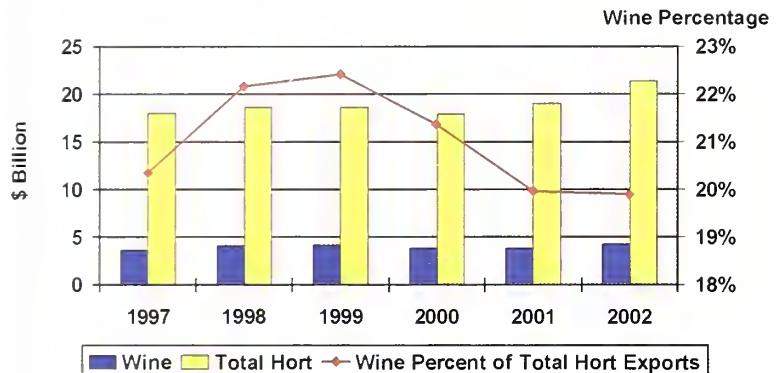
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

EU Exports of Selected Horticultural Products to Third Countries



Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

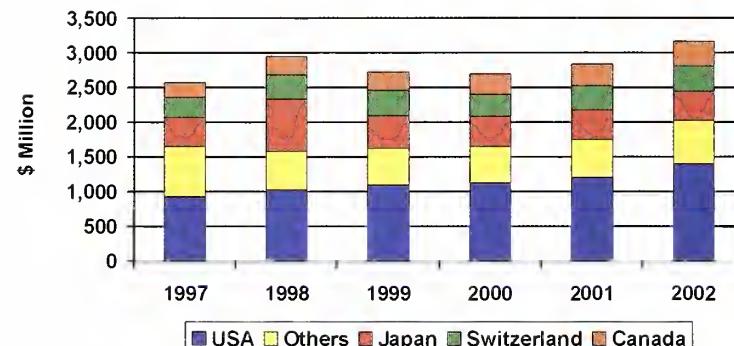
Wine is the Primary Beverage Export from the EU



Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

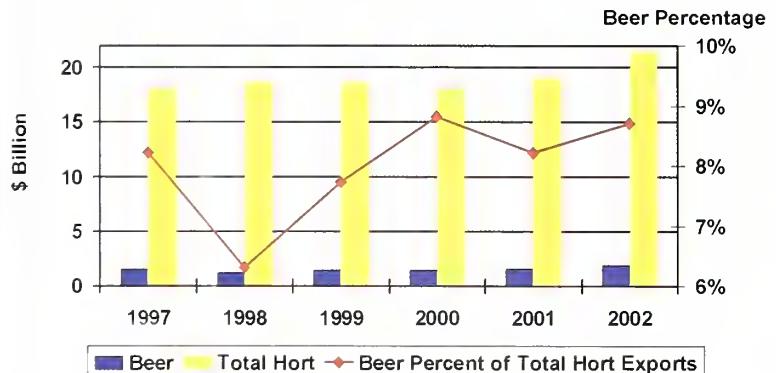
EU Wine Exports to Third Country Markets

(HS 2004.21- Table and Fortified Wine in Containers 2 Liters or Less)



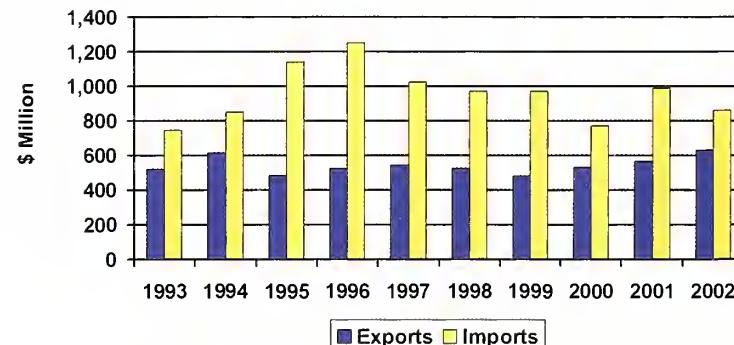
Source: Global Trade Atlas

Beer Exports from the EU and Its Share of Total Horticultural Exports



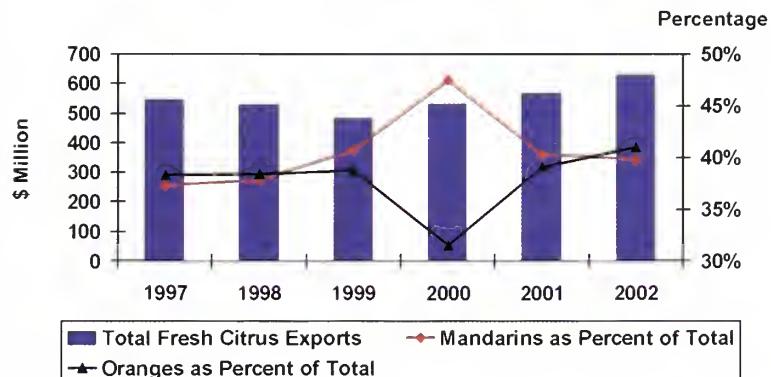
Source: Global Trade Atlas

EU Trade in Fresh Citrus (HS 0805)



Source: Global Trade Atlas

EU Fresh Citrus Exports: Mandarins and Oranges as a Percent of Total Citrus Exports



Source: Global Trade Atlas

EU Export Refunds for Fruit & Vegetables - Actual Expenditures (million euros)

	1999	2000	2001
Fresh Fruit & Vegetables	23.2	32.8	36.1
Processed Fruit & Vegetables	17.3	13.3	14.8
Total	40.5	46.1	50.9

Source: European Commission – Financial Report 2001

EU Financial Aid for Fruit and Vegetables (million euros)

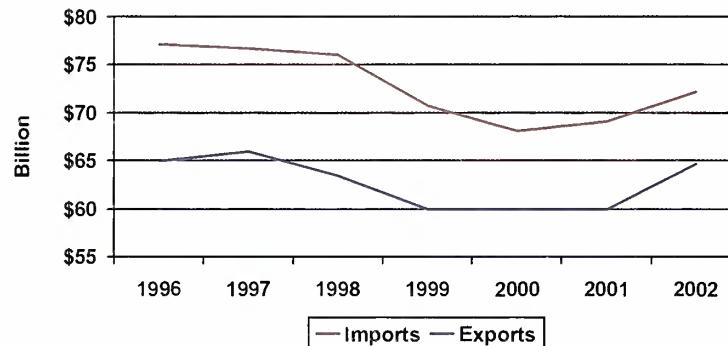
Production Aid For:	Actual Expenditure 2001	Appropriations 2002	Appropriations 2003
Processed tomatoes	223	285	279
Fruit-based products	71	83	86
Dried grapes (includes intervention)	113	127	112
Citrus fruits	170	231	249

Source: EU 2003 Budget

EU Horticultural Imports: A Global View

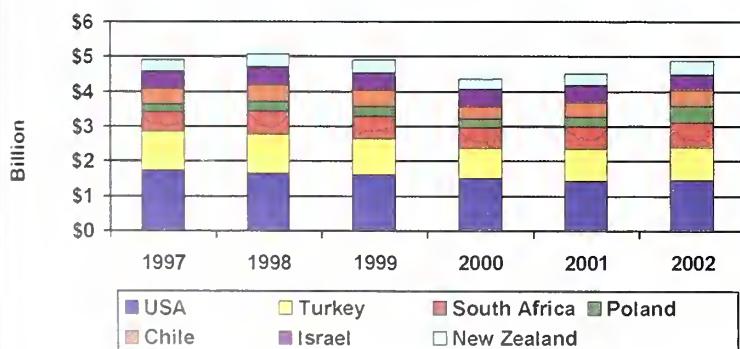
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

EU Total Agricultural Trade with Third Countries



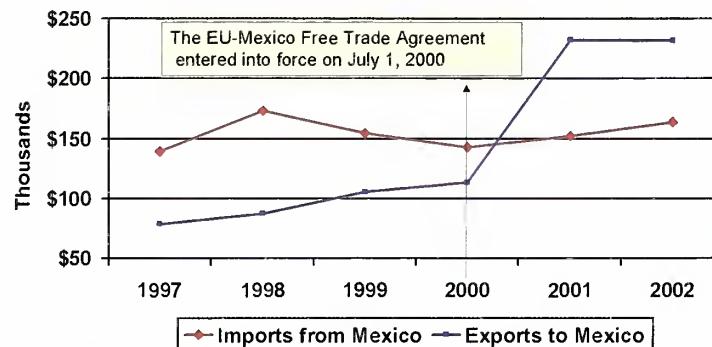
Source: Global Trade Atlas

EU Horticultural Product Imports by Top Suppliers



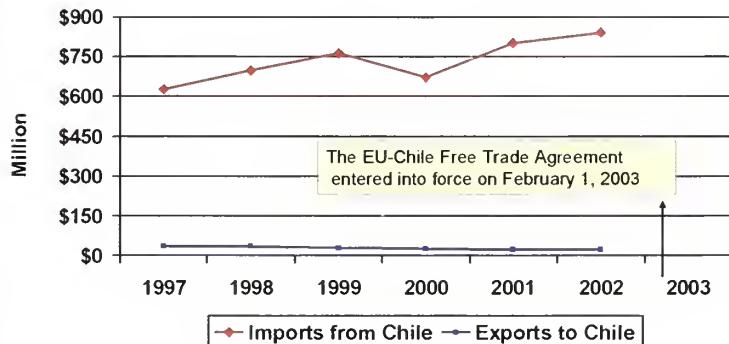
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

EU Horticultural Product Trade with Mexico



Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

EU Horticultural Product Trade with Chile



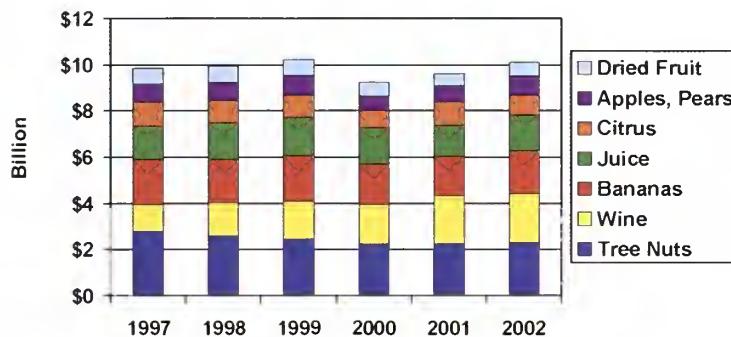
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

2004 Applied EU Tariff Rates for Selected Horticultural Products

Commodity	HS # (s)	Rate	Commodity	HS # (s)	Rate
Oranges	080510	3.2-16.0 5/	Pistachios	080250	1.6
Grapefruit	080540	1.5-2.4	Walnuts	08023	5.1
Lemons	80550	6.4 6/	Corn p/p	200580	5.1 + 94 EUR/Ton
FCOJ	200911	33.6 7/	Broccoli	070410	9.6-13.6 14/
OJ, nt frz	200919	33.6 7/	Lettuce	070511	10.4-12.15/
Apples	080810	4.0-11.2 8/	Tomatoes	070200	8.8-14.4 16/
Pears	080820	5-10.4 8/	Raisins	080620	2.4
Cherries	080920	12 9/	Prunes	081320	9.6
Peach/Nect	080930	17.6 12/	Wine	22042	13.1-32 EUR per hl
Strawberry	081010	11.2-12.8	Potato x sd	070190	9.6-13.4
Grapes	080610	11.5-17.6 13/	Potato chip	200520	14.1
Almonds ns	080211	5.6	Frz t/f	200410	17.6
Almonds sh	080212	3.5			

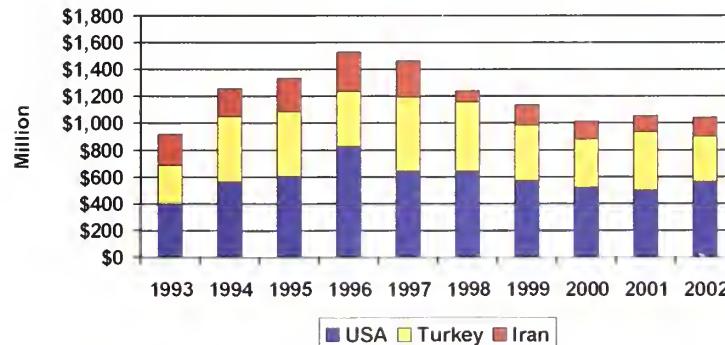
Notes: Information contained in this table is intended for illustrative purposes. Accuracy of individual entries is not guaranteed. Shaded areas represent import tariffs higher than the United States.
 5/plus entry price during the period 125-531: max 71 EUR/ton 6/plus entry price max 256 EUR/ton 7/plus 206 EUR/ton 8/plus entry price max 238 EUR/ton 9/ plus entry price max 274 EUR/ton 12/plus entry price during the period 61-930: max 130 EUR/ton 13/plus entry price during the period 721-1120: max 96 EUR/ton 14/from 1/1-14 and 12/1-12/19: 96 percent of the cif value, minimum of 1.6 Eu per 100 kg/net and 4/15-11/30: 13.6 percent, minimum of 1.6 EUR per 100 kg/net 15/from 1/1-3/31 and 12/31: 10.4 percent minimum 1.3 EUR per 100kg/gross, and 4/1-11/30: 12 percent, minimum 2 EUR per 100 kilograms 16/plus entry price 298 EUR/ton

EU Imports of Selected Horticultural Products from Third Countries



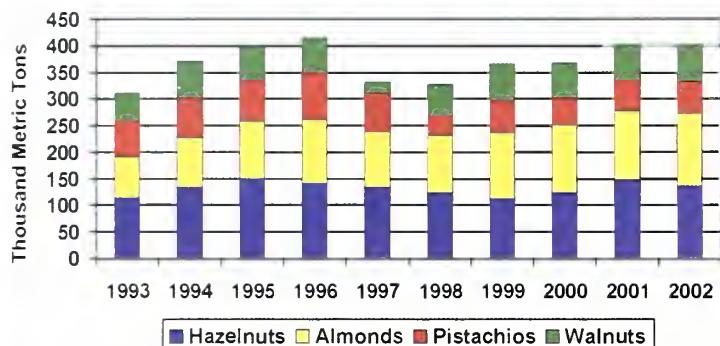
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

EU Imports of Edible Tree Nuts By Country (HS 0802)



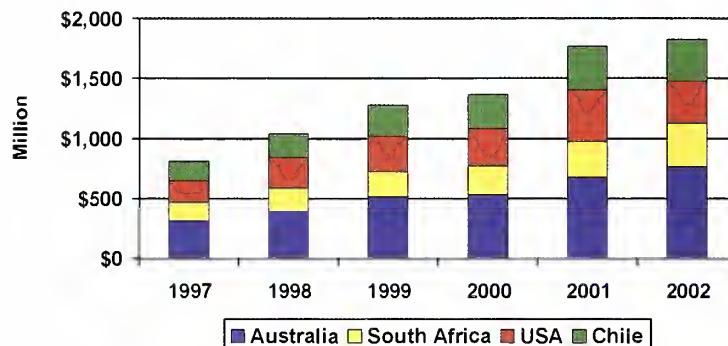
Source: Global Trade Atlas

EU Imports of Leading Tree Nuts



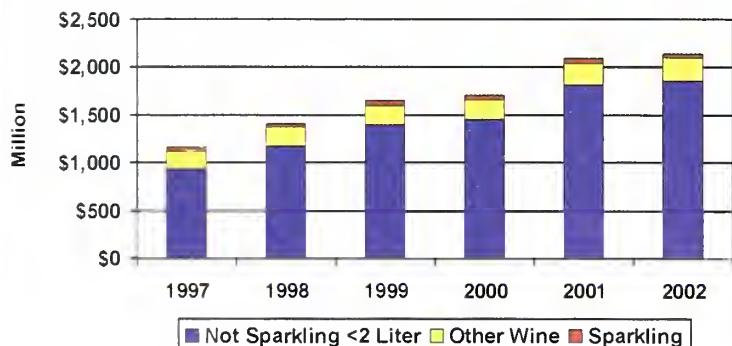
Source: Global Trade Atlas

EU Wine Imports by Country (HS 2204)



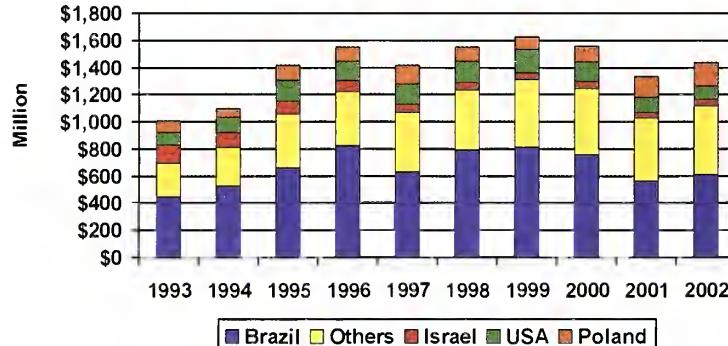
Source: Global Trade Atlas

EU Wine Imports by Type



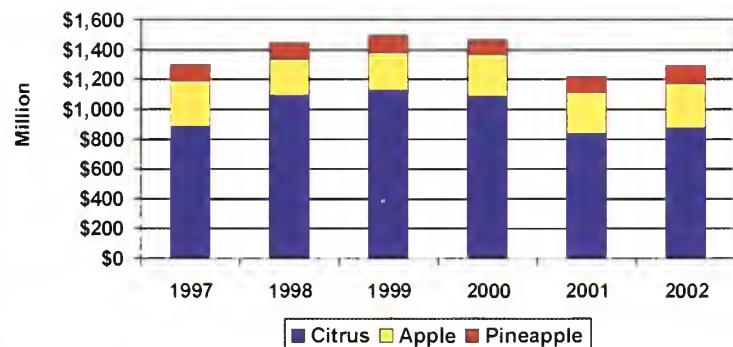
Source: Global Trade Atlas

EU Imports of Fruit Juices by Country (HS 2009)



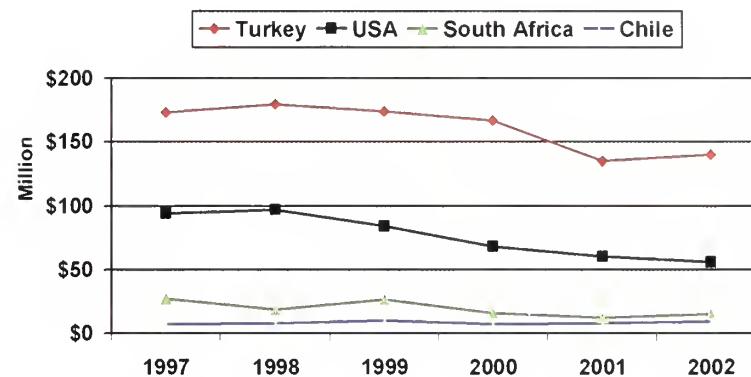
Source: Global Trade Atlas

EU Imports of Fruit Juices (HS 2009)



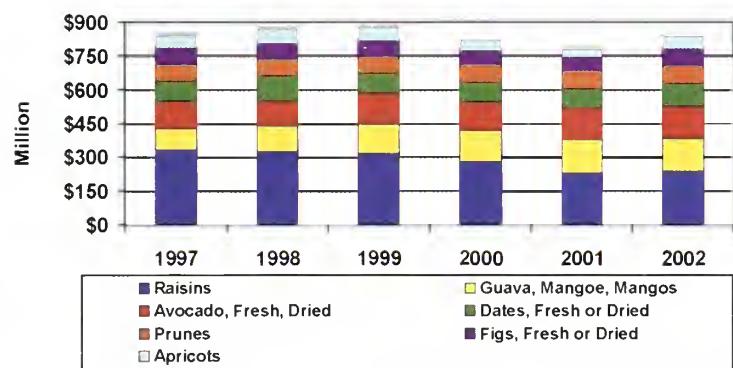
Source: Global Trade Atlas

EU Raisin Imports by Country



Source: Global Trade Atlas

EU Imports of Dried Fruit

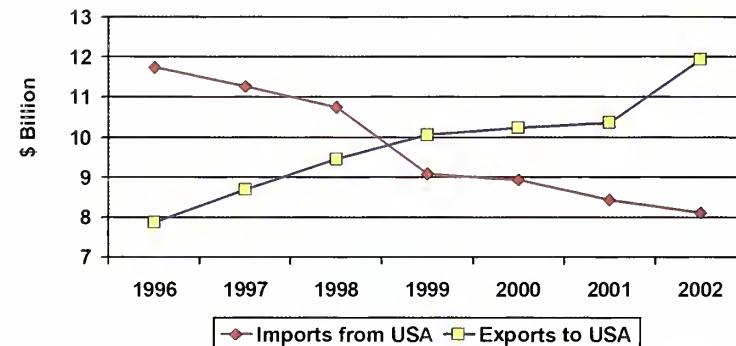


Source: Global Trade Atlas

EU Horticultural Trade with the United States

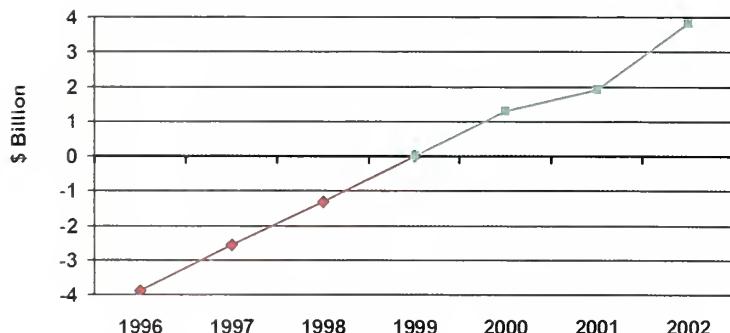
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

EU Total Agricultural Trade with the United States

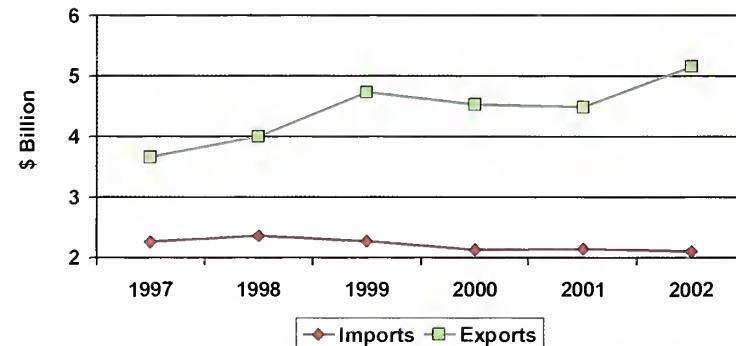


Source: Global Trade Atlas

EU Net Agricultural Trade With the United States



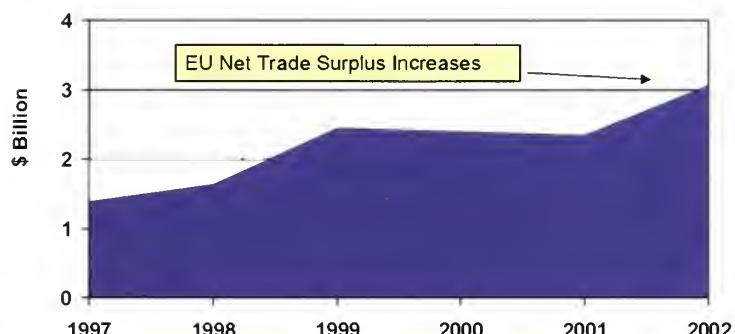
EU Horticultural Trade with the United States



Source: Global Trade Atlas

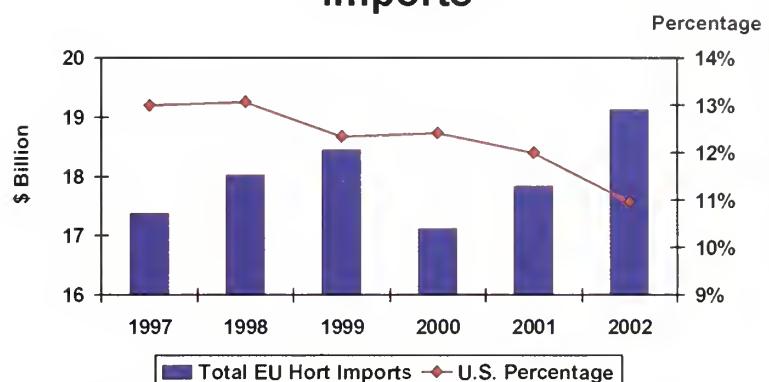
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

Net EU Horticultural Trade with the United States



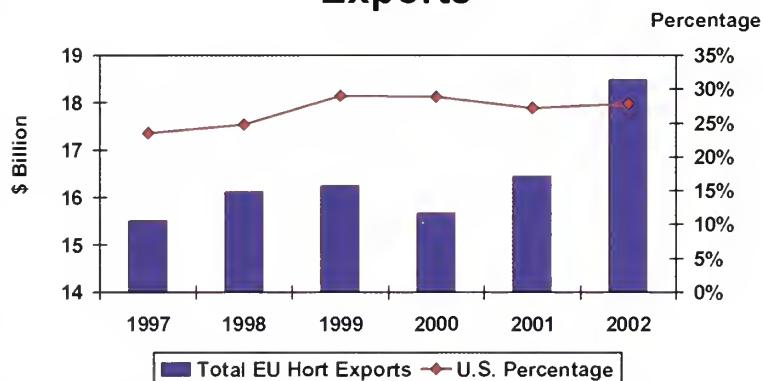
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

EU Imports from the U.S. as a Percent of Total EU Horticultural Imports



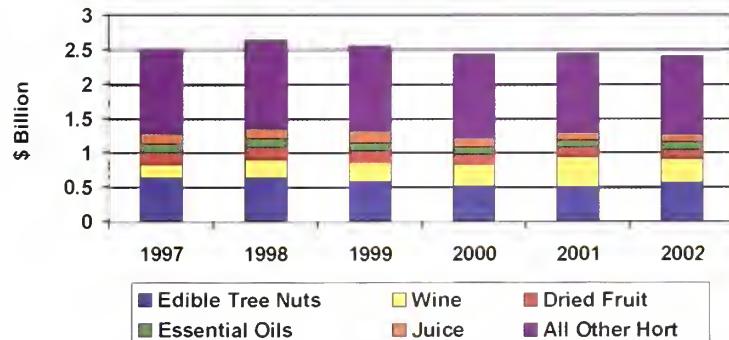
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

EU Exports to the U.S. as a Percent of Total EU Horticultural Exports



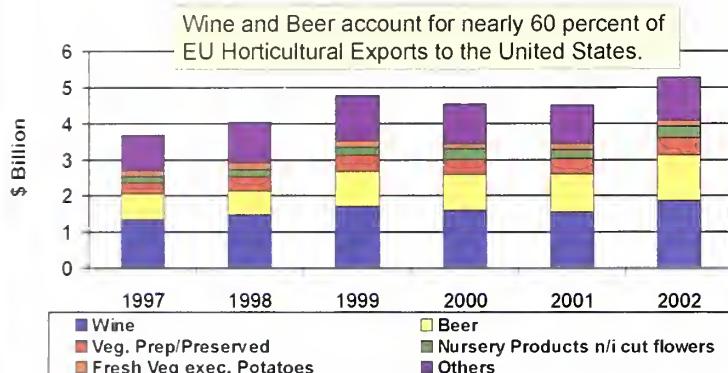
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

Top EU Horticultural Imports From the United States



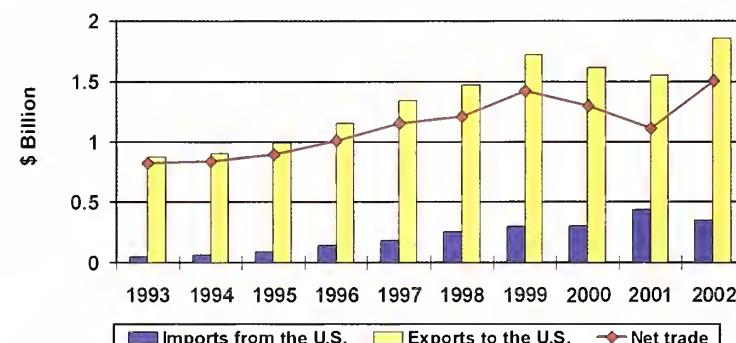
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

Principal Horticultural Product Exports to the United States



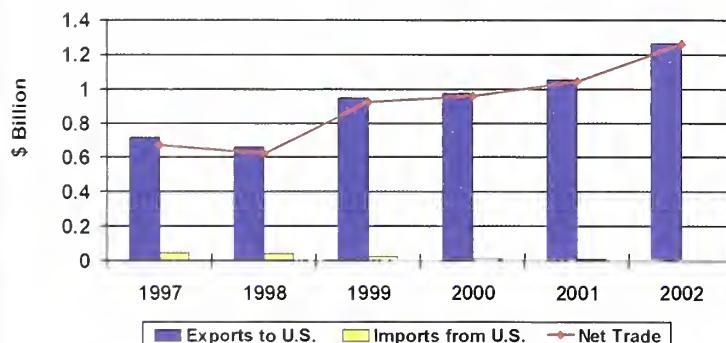
Source: Global Trade Atlas
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine, and Beer.

Net EU Wine Trade with the United States



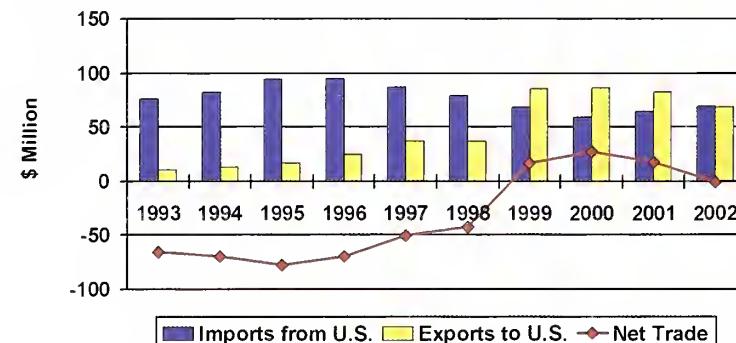
Source: Global Trade Atlas

Net EU Beer Trade with the United States



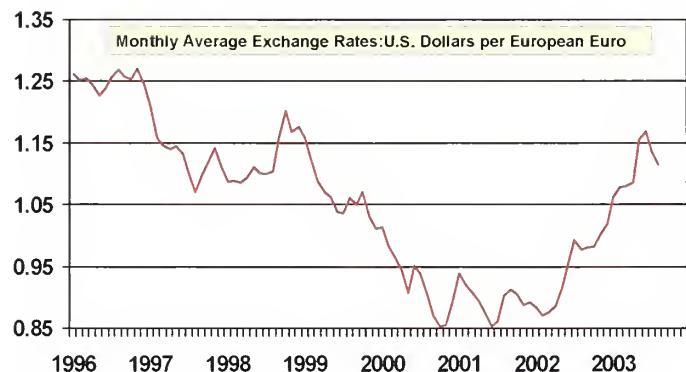
Source: Global Trade Atlas

EU Net Fresh Citrus Trade with the United States



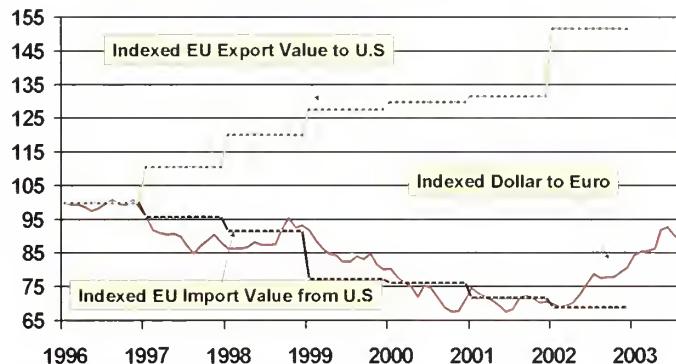
Source: Global Trade Atlas

Historical Exchange Rates: U.S. Dollar/EU Euro



Source: Pacific Exchange Rate Service

Indexed Exchange Rates and EU/ US Trade Data (Total Agriculture)

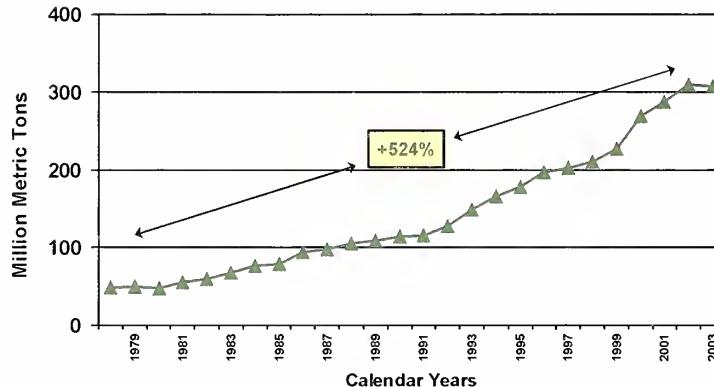


Source: Global Trade Atlas and Pacific Exchange Rate Service

China and Hong Kong: Market Opportunities and Challenges for U.S. Horticultural Products

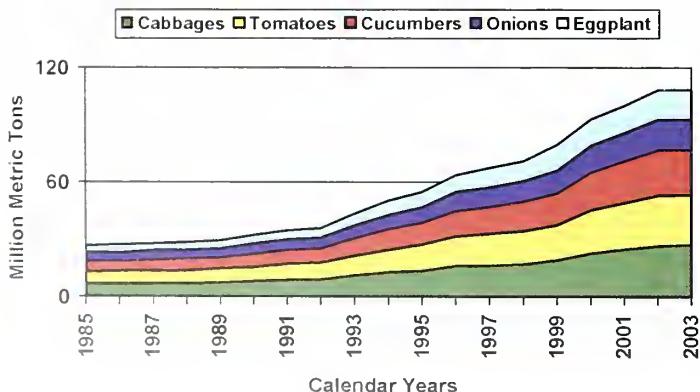
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

China's Vegetable Production



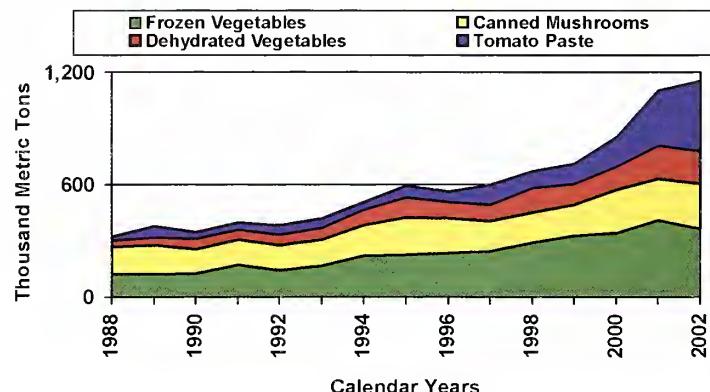
Source: Food and Agriculture Organization (FAO) of the United Nations. Excludes Potatoes.

China's Production of Selected Vegetables



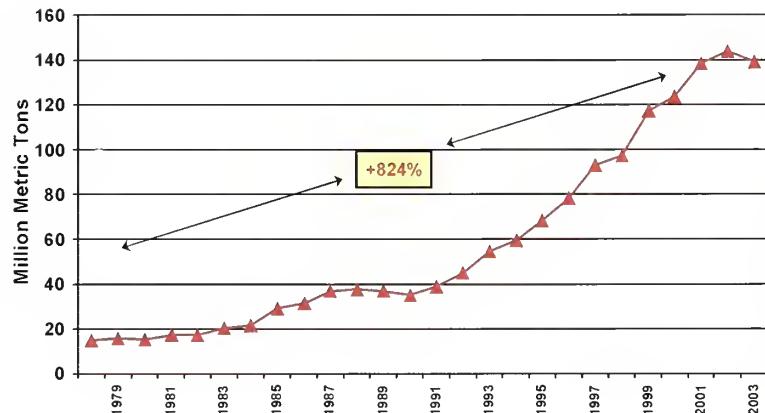
Source: Food and Agriculture Organization (FAO) of the United Nations

China's Exports of Processed Vegetables



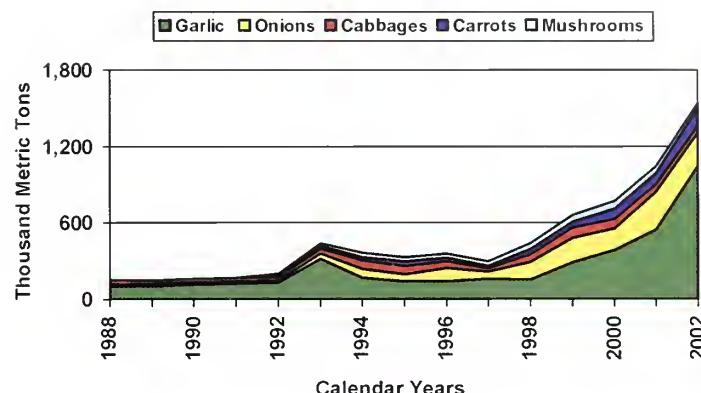
Source: Food and Agriculture Organization (FAO) of the United Nations

China's Total Fruit Production



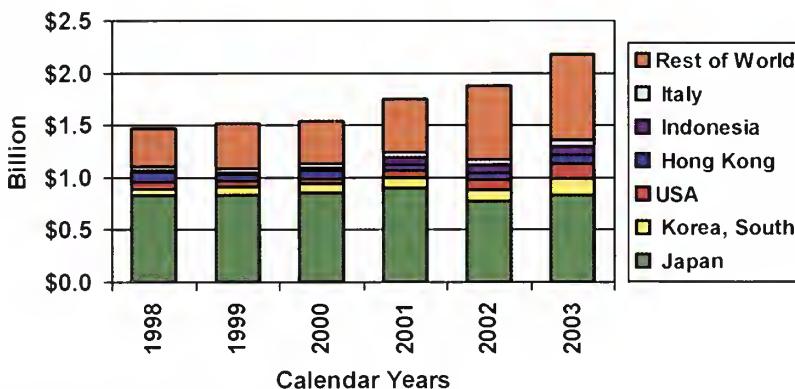
Source: Food and Agriculture Organization (FAO) of the United Nations. Includes melons.

China's Vegetable Exports



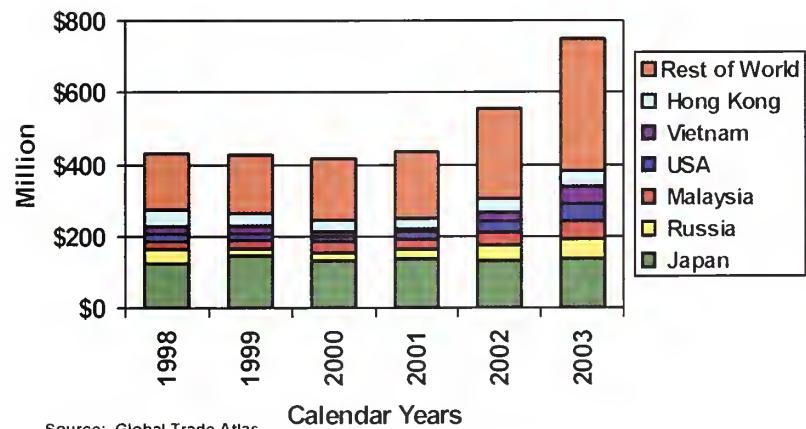
Source: Food and Agriculture Organization (FAO) of the United Nations

China's Vegetable Exports (HS Chapter 7)



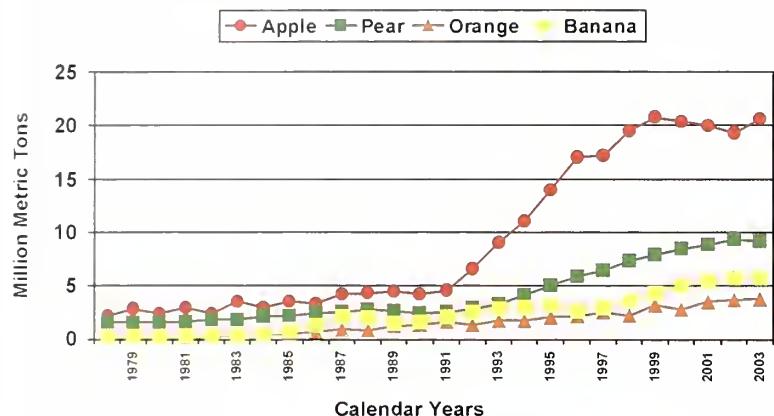
Source: Global Trade Atlas

China's Fruit Exports (HS Chapter 8)



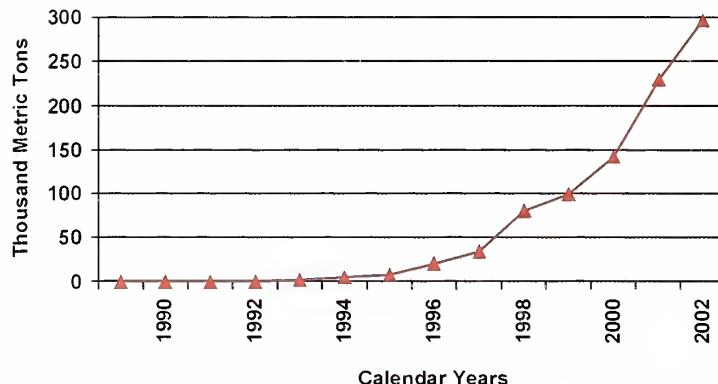
Source: Global Trade Atlas

China's Fruit Production



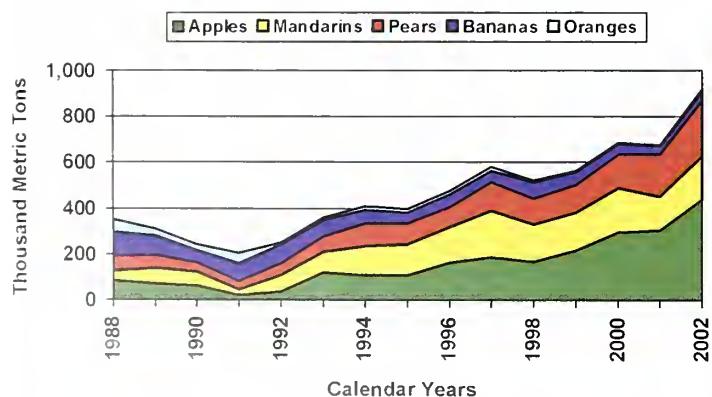
Source: Food and Agriculture Organization (FAO) of the United Nations

China's Exports of Apple Juice



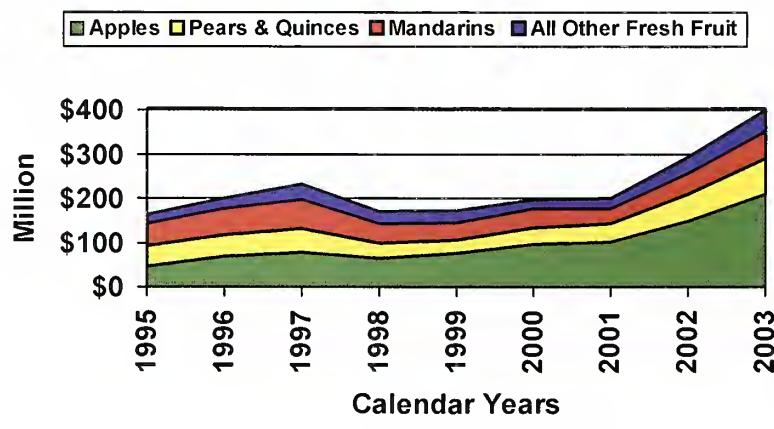
Source: Food and Agriculture Organization (FAO) of the United Nations

China's Fruit Exports



Source: Food and Agriculture Organization (FAO) of the United Nations

China Fresh Fruit Exports

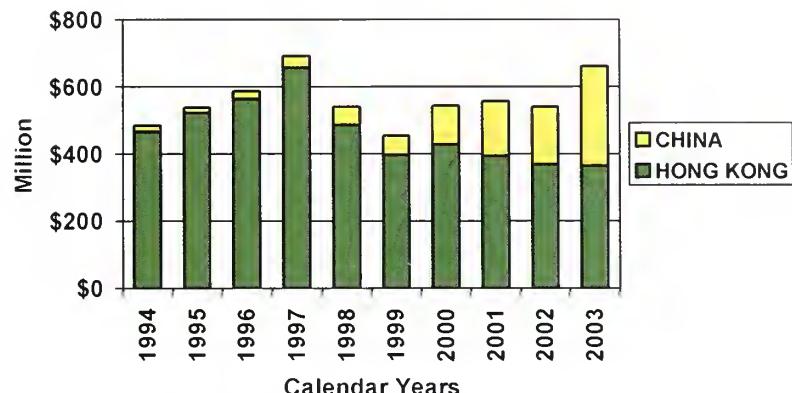


Source: Global Trade Atlas

China's Tariffs: Accession Reductions with WTO Will Facilitate Trade

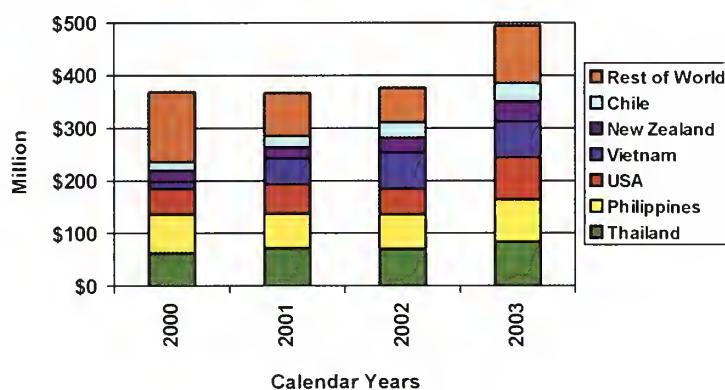
Priority Products	Pre-WTO Tariffs (Percent Ad Valorem Duty)	WTO Tariffs after Phase-In Period (Percent Ad Valorem Duty)
Table Grapes	40	13
Frozen Potato Fries	25	13
Wine	65	20
Shelled Almonds	30	10
Pistachio Nuts	35	10
Oranges	40	12
Apples	30	10

U.S. Horticultural Exports to China and Hong Kong



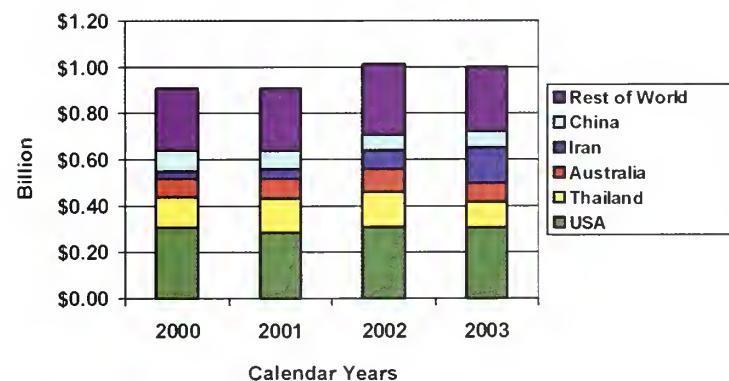
Source: Bureau of the Census, DOC

China's Imports of Fruits and Nuts (HS Chapter 8)



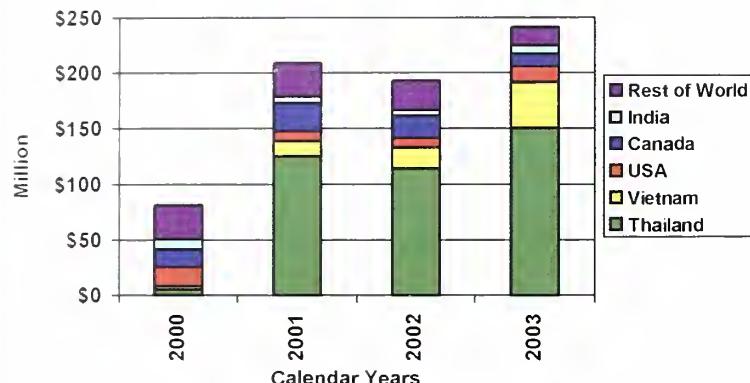
Source: Global Trade Atlas

Hong Kong's Imports of Fruits and Nuts (HS Chapter 8)



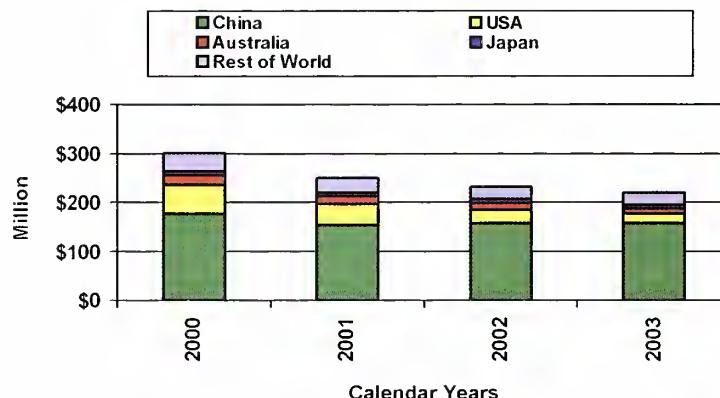
Source: Global Trade Atlas

China's Imports of Vegetables (HS Chapter 7)



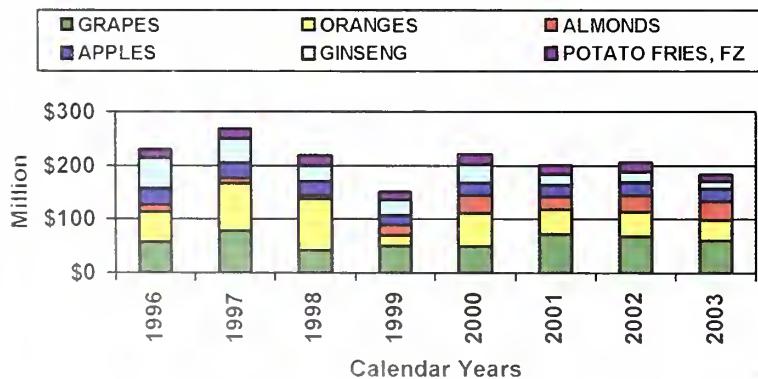
Source: Global Trade Atlas

Hong Kong's Imports of Vegetables (HS Chapter 7)



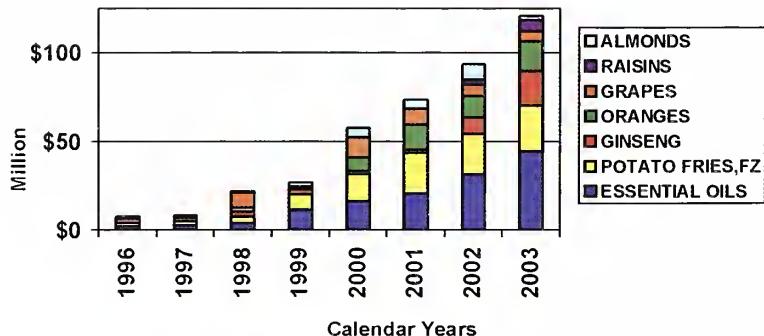
Source: Global Trade Atlas

U.S. Exports of Selected Horticultural Products to Hong Kong



Source: Bureau of the Census, DOC

U.S. Exports of Selected Horticultural Products to China



Source: Bureau of the Census, DOC

U.S.-Australia Horticultural Trade

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Impediments To Horticultural Trade

Tariffs

- Overall comparable tariff barriers exist for both countries.
- However, certain specific U.S. products are import sensitive and carry a significant duty.
- Australia maintains negligible tariff barriers on all but a few items.

Non-Tariff Barriers

- Both countries maintain Sanitary and Phytosanitary (SPS) measures. These are mainly based on scientific justification.

Free Trade Agreement

- On February 13, 2004, the Bush administration notified Congress of its intent to sign the U.S. - Australia Free Trade Agreement (FTA). Negotiations began in March 2003.
- Under the trade promotion authority (TPA) legislation, the notification begins a 90-day period that must elapse before the agreement can be formally signed and implementing legislation can be sent to Congress.
- During those 90 days, the administration is expected to consult with Congress and private sector advisors on details of the FTA.

Selected Horticultural Tariffs

	Selected U.S. Tariffs		Selected Australian Tariffs	
	Current Duty	Negotiated Duty	Current Duty	Negotiated Duty
Frozen OJ Conc.	43%	F	Potato Flour & Meal	29% 0
Other Single Citrus Juice	35%	F	Orange Juice	24% 0
Canned Apricots	29%	F	Wine	15% 0
Other Canned Fruits	15% - 175%	F	Canned Tomatoes	11% 0
Nut Mixtures	22%	F	Table Grapes & Raisins	10% 0
OJ – not frozen	22%	F	Frozen French Fries	8% 0
Grapefruit Juice	20%	F	Frozen Sweet Corn	8% 0
Almonds, shelled	13%	A	Canned Fruit	8% 0
Canned Tomatoes	12%	F	Other Juices	8% 0
Tomato Sauce	11%	F	U.S. Negotiated Duty Staging Codes: A – Duty free upon entry of the Agreement. F – 18 year equal stage reduction. Duty free January 1 of year 18.	
Grapefruit (seasonal)	24%	F		

SPS Barriers by Country

U.S. SPS Barriers Affecting Australian Horticultural Products	Australian SPS Barriers Affecting U.S. Horticultural Products
• Citrus low pest area – Blackspot	• Florida Grapefruit
• Citrus from the Riverland Area	• California and Northwest Stone Fruit, including peaches, nectarines, plums
• Tomatoes hothouse	• California Table Grapes
• Tomatoes field grown	
• Cherries	
• Mangos	
• Avocados	
• Tropical Fruit	

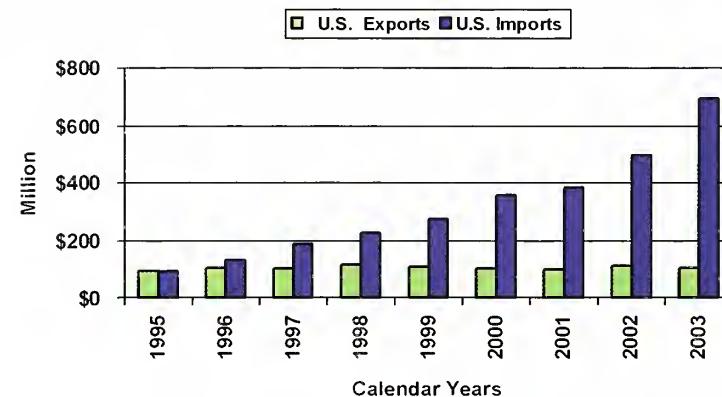
Free Trade Agreement Outcome for Fruits and Nuts

Australian Commitment	U.S. Commitment
• Australia locks in duty-free treatment for all U.S. fruits and nuts.	• The U.S. establishes a preferential tariff-rate quota (TRQ) for avocados -- duty free 2/1 to 9/15 for 1,500 metric tons; duty free 9/16 to 1/31 for 2,500 metric tons.
• Commits to duty free treatment for fruit juices. The U.S. import market share for all fruit juice is currently 40 percent.	• Safeguard measures on certain items if the price drops below a pre-determined level. Among these items are: canned tomatoes and sauces, grape juice and orange juice. Safeguards will be in place for 18 years.
• Commits to addressing outstanding phytosanitary issues for apples, Florida citrus, and stone fruits	

Free Trade Agreement Outcome for Vegetables

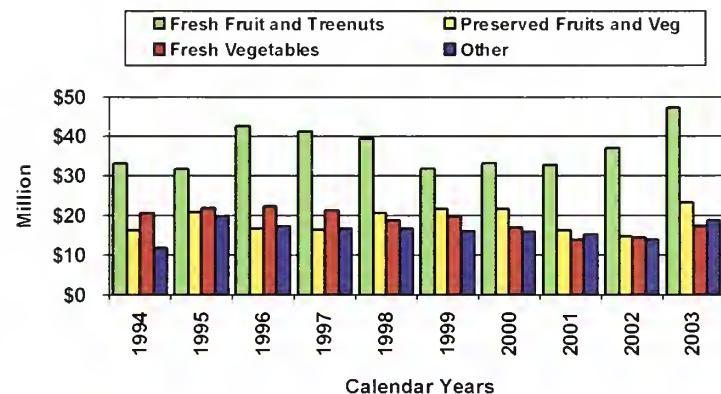
Australian Commitment	U.S. Commitment
• Australia locks in duty-free treatment for imports of all U.S. vegetables.	• The U.S. grants duty-free status to over 60 percent of all vegetable products.
• U.S. shipments of frozen vegetables is the primary beneficiary of this concession. The U.S. import market share for frozen vegetables is 17 percent; valued at \$630,000.	• Import tariffs for 17 percent of the vegetable items will be phased out over 4 years, 14 percent will be phased out over 10 years, and 4 percent will be phased out over 18 years. • Safeguard measures may be imposed if the price drops below a pre-determined level. These include dried onion, garlic, and processed asparagus. Safeguards will be in place for 18 years.

U.S. Horticultural Trade With Australia



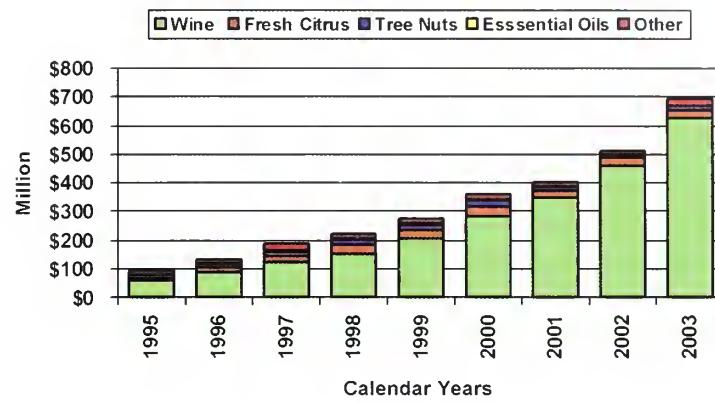
Source: Bureau of the Census, DOC

Australian Imports of Horticultural Products from the United States



Source: Global Trade Atlas

U.S. Imports of Horticultural Products from Australia

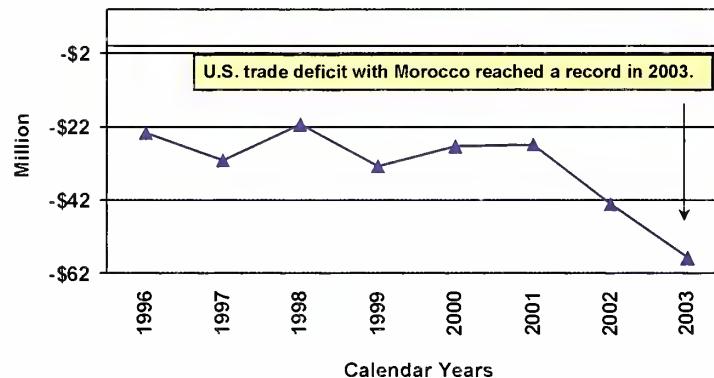


Source: Bureau of the Census, DOC

U.S.-Morocco Horticultural Trade

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

U.S. Horticultural Trade Balance with Morocco



Source: Bureau of the Census, DOC

Morocco Facts

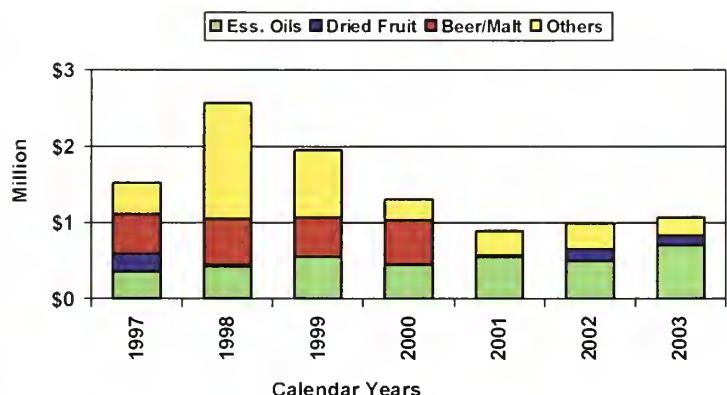
- Population is 30 million
- 55 percent of the population is less than 25 years old
- Agriculture accounts for up to 18 percent of GDP
- Agriculture provides for 40 percent of jobs
- Nearly 75 percent of farms are less than 5 hectares
- 10 percent of land is irrigated
- Irrigated lands account for 25 percent of output
- Irrigated lands account for 80 percent of agricultural exports
- Net exporter of fruit and vegetables
- Morocco has an FTA with the EU
- The EU is the major trading partner, accounting for over 63 percent of the total
- About 42 percent of imports are from the EU
- Relatively high tariffs
- Some export subsidies
- Prohibits all GMO products

Morocco's Import Duties on Selected Products

HS Code	Commodity	Import Duty (ad valorem)
07131099	Green Peas	50%
08021299	Almonds, shelled	50%
08041050	Dates	50%
08051000	Oranges	50%
08062000	Raisins	53.5%
08081010	Apples	53.5%
08131000	Dried Apricots	50%
08132000	Dried Prunes	53.5%
220300	Beer/Malt	50%
3301-3302	Essential Oils	17.5%-50%

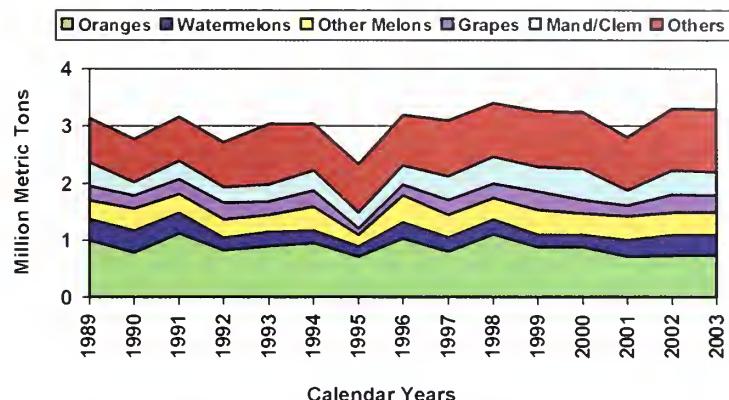
Source: Morocco's Tariff Schedule

U.S. Top Horticultural Exports to Morocco



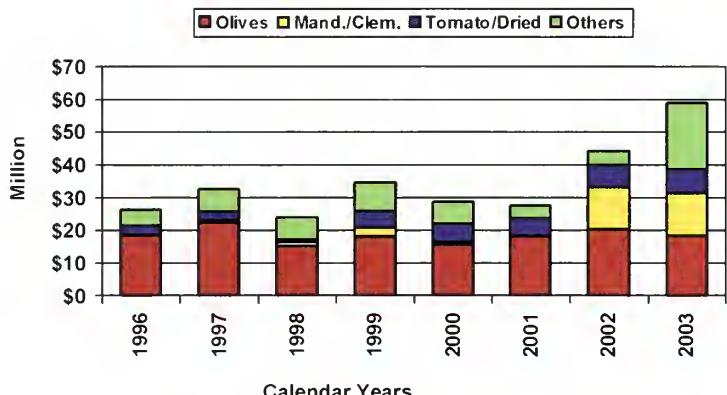
Source: Bureau of the Census, DOC

Morocco's Fruit Production



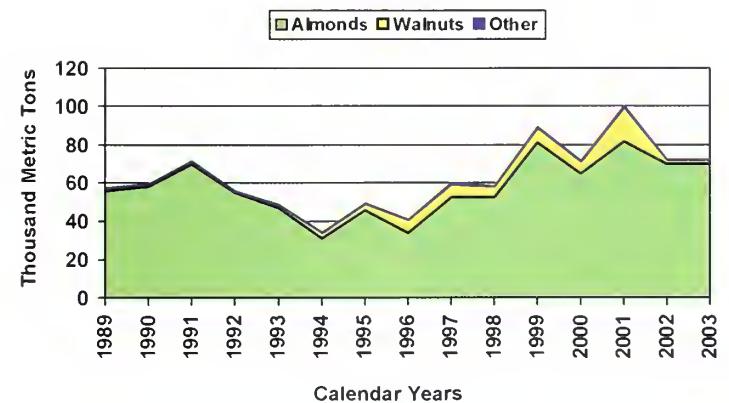
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Top Horticultural Imports from Morocco



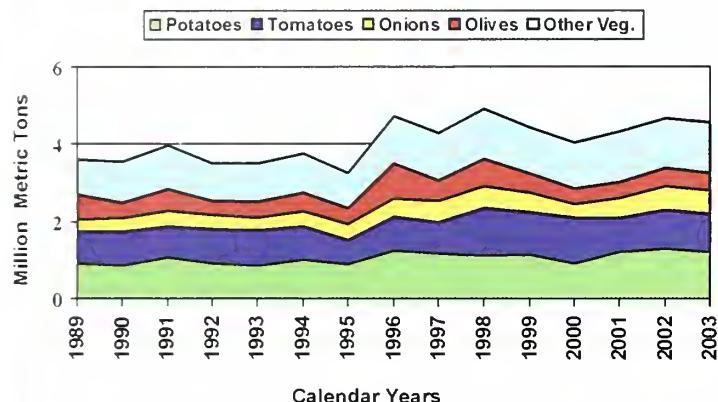
Source: Bureau of the Census, DOC

Morocco's Tree Nut Production



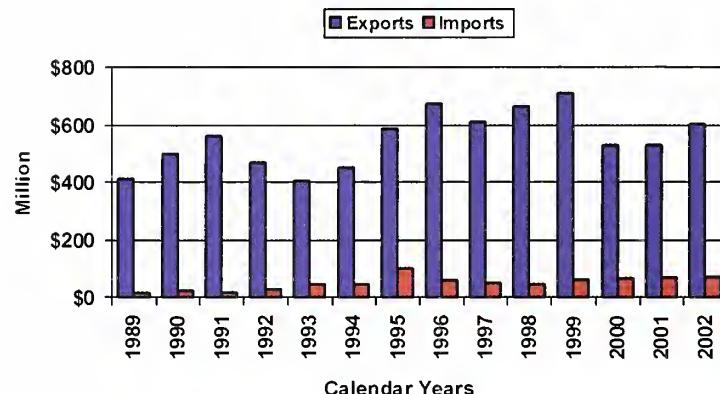
Source: Food and Agriculture Organization (FAO) of the United Nations

Morocco's Vegetable Production



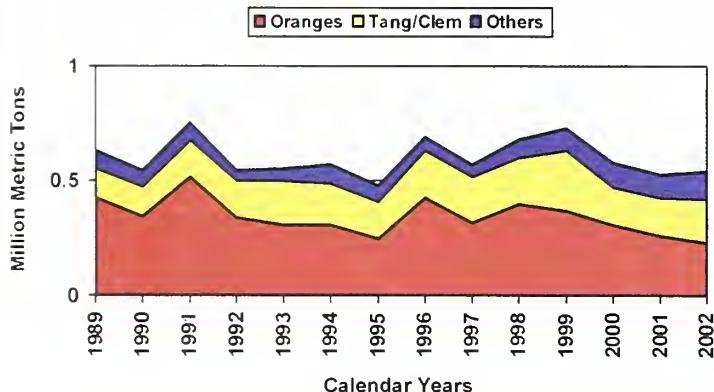
Source: Food and Agriculture Organization (FAO) of the United Nations

Value of Morocco's Fruit, Nuts, and Vegetable Trade



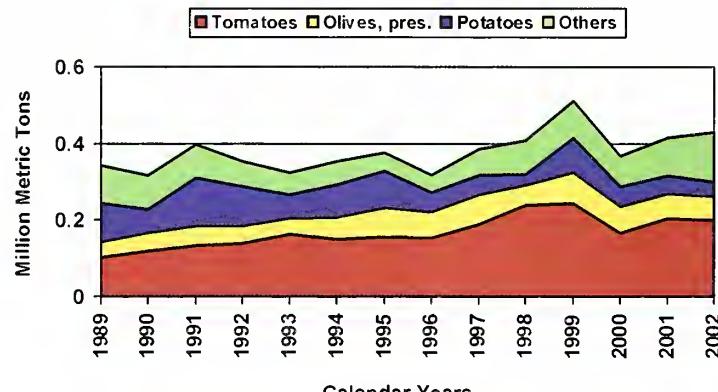
Source: Food and Agriculture Organization (FAO) of the United Nations
Note- Includes processed

Morocco's Fruit Exports



Source: Food and Agriculture Organization (FAO) of the United Nations
Note- Includes processed

Morocco's Vegetable Exports



Source: Food and Agriculture Organization (FAO) of the United Nations
Note- Includes processed

U.S. Horticultural Trade Under the Central American Free Trade Agreement

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Central American Free Trade Agreement (CAFTA)

- Negotiations concluded on January 25, 2004
- Includes five countries:
 - Costa Rica
 - El Salvador
 - Guatemala
 - Honduras
 - Nicaragua
- On March 15, 2004, the U.S. & Dominican Republic Concluded Trade Talks Integrating the Dominican Republic into CAFTA. However, this presentation does not include data on the Dominican Republic.
- U.S. gains eventual duty-free, quota-free access on essentially all products into CAFTA countries
- CAFTA countries *maintain* and lock-in current duty-free treatment extended under Caribbean Basin Initiative benefits.

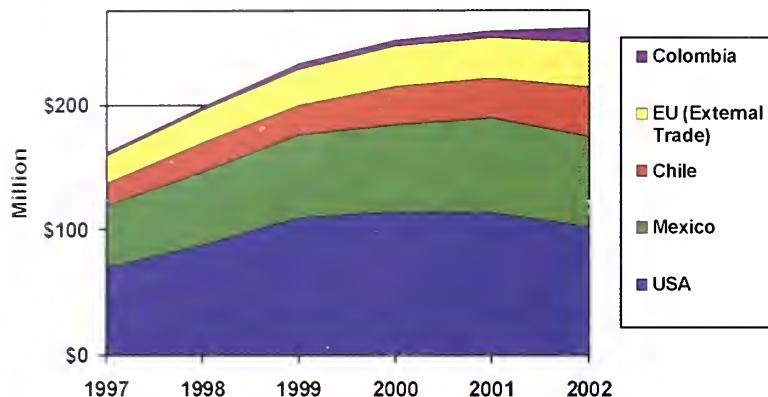
Central American Free Trade Agreement (CAFTA)

- Over 99 percent of agricultural imports from Central American (on a trade-weighted basis) enter the United States duty-free under MFN tariffs and CBI preferences. Thus, CAFTA results in limited additional import competition.
- Removing trade barriers between the United States and the CAFTA countries will create important new export opportunities for U.S. farmers, ranchers, and processors.
- CAFTA countries comprise roughly 34 million consumers with per capita annual incomes ranging from nearly \$2,000 to over \$8,500 (PPI 2001). This represents a significant growth market for U.S. producers.

Agricultural Exports to CAFTA Countries

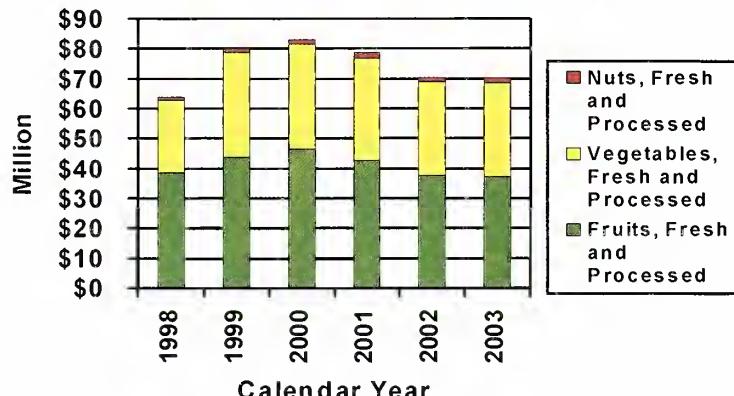
- U.S. agricultural exports to CAFTA countries totaled over \$1.1 billion in 2003, of which horticultural exports totaled \$116 million.
- The average allowed tariff for the Central American countries under their WTO commitments are:
 - 42% in Costa Rica
 - 41% in El Salvador
 - 49% in Guatemala
 - 35% in Honduras
 - 60% in Nicaragua
- Eliminating these tariffs will create, in many cases, preferences for U.S. exporters over third-country suppliers.

Horticultural Exports to CAFTA Countries by Major Suppliers



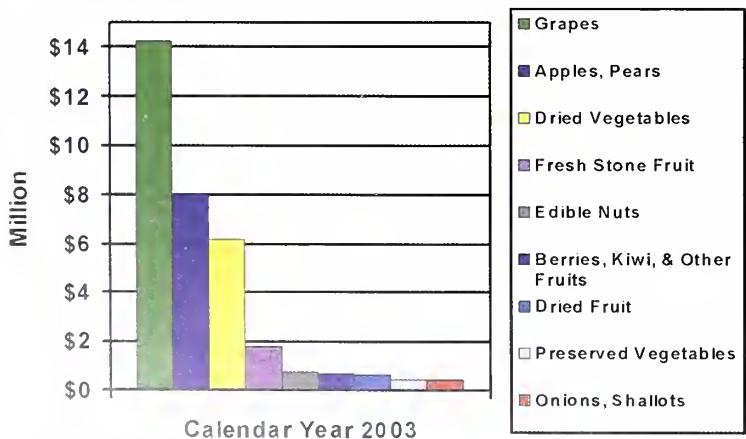
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.
Source: Global Trade Atlas

U.S. Exports of Fruits, Vegetables and Tree Nuts to CAFTA Countries



Source: Bureau of the Census, DOC

Top U.S. Exports of Fruits, Vegetables, and Nuts to CAFTA Countries

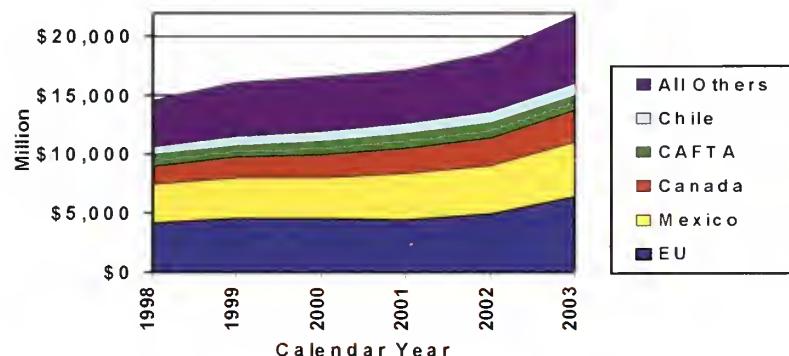


Source: Bureau of the Census, DOC

Agricultural Imports from CAFTA Countries

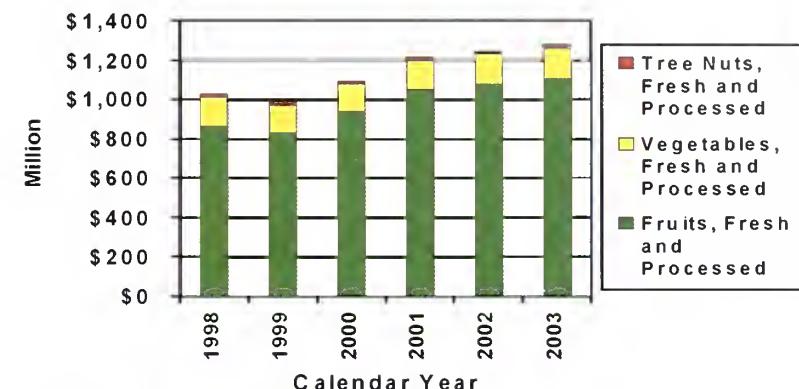
- Over 99 percent of agricultural imports from Central America (on a trade-weighted basis) enter the United States duty-free under MFN tariffs and CBI preferences.
- The United States imported over \$2 billion in agricultural products from Central America in 2003.
- The vast majority of these imports constitute non-competitive crops, such as coffee and tropical fruits.
- Horticultural product imports from CAFTA countries averaged \$1.26 billion over the past three years.

U.S. Horticultural Imports from all Countries CAFTA Share of Total Horticultural Import Market



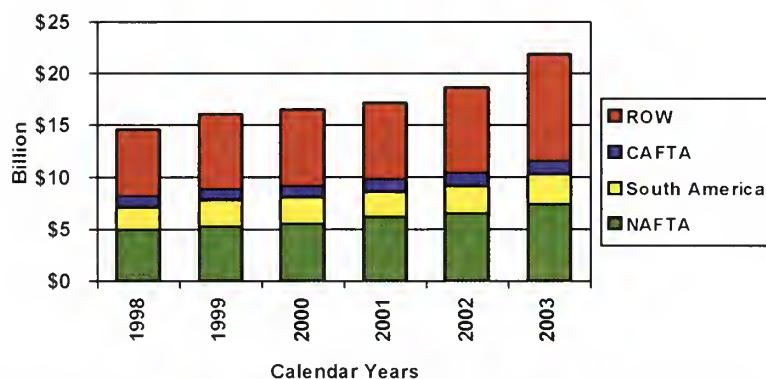
Source: Bureau of the Census, DOC
Horticultural Trade Includes: Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Vegetables, Fruits, Nuts, Essential Oils, Nursery Products, Cut Flowers, Wine and Beer.

U.S. Imports of Fruits, Vegetables and Tree Nuts from CAFTA Countries



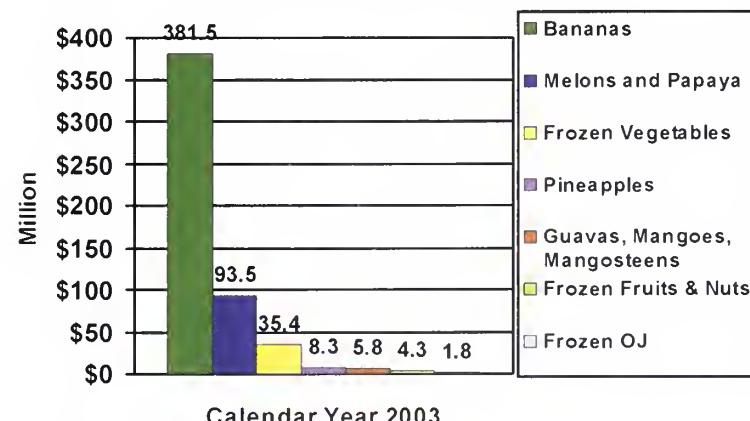
Source: Bureau of the Census, DOC

U.S. Horticultural Imports Western Hemisphere Trading Blocks



NAFTA includes Mexico and Canada. CAFTA is defined as the 5 countries of the proposed U.S.-Central America Free Trade Agreement (Costa Rica, El Salvador, Guatemala, Honduras, and Nicaragua).
Source: Bureau of the Census, DOC

Top U.S. Fruit and Vegetable Imports from CAFTA Countries



Source: Bureau of the Census, DOC

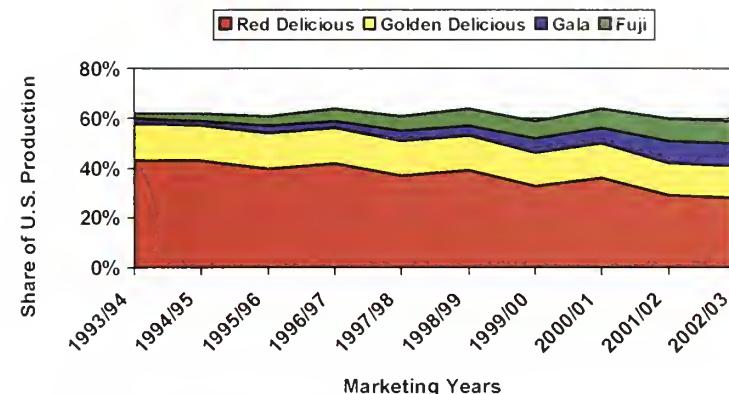
Commodity Reports

- Fruits
- Tree Nuts
- Vegetables
- Wine

The U.S. and World Situation: Apples

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Main Commercial Apple Varieties Grown in the United States



Source: USAPPLE Association
Note- Marketing year is September-August.

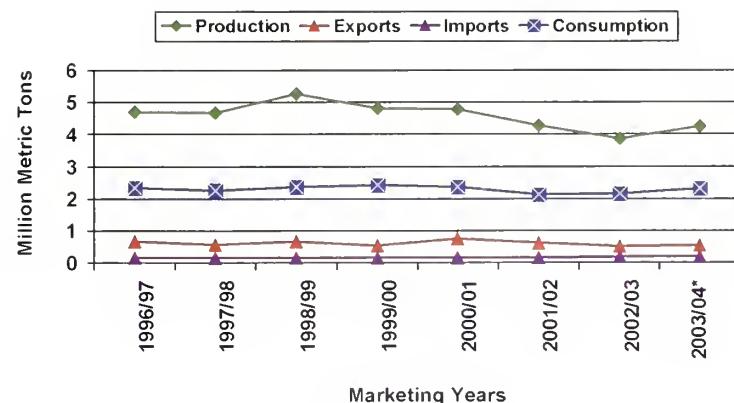
U.S. Per Capita Fresh Apple Consumption



* Estimate

Source: Economic Research Service, USDA, Marketing Year August - July

The U.S. Apple Market

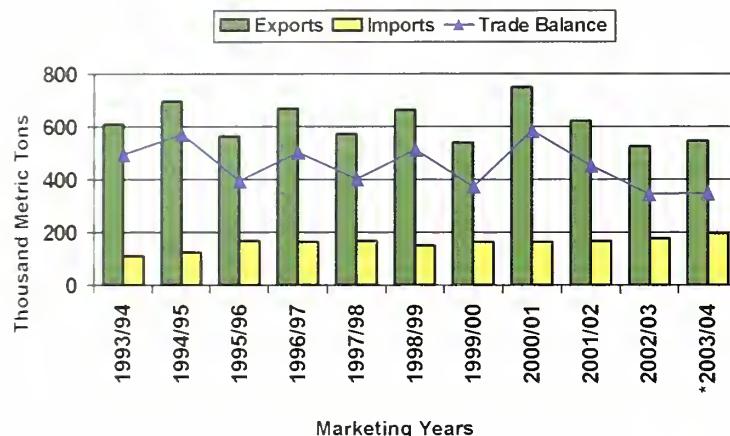


Source: National Agricultural Statistics Service, USDA

Bureau of the Census, DOC

Note- Marketing year is July - June. *Data for MY 2003/04 is a forecast.

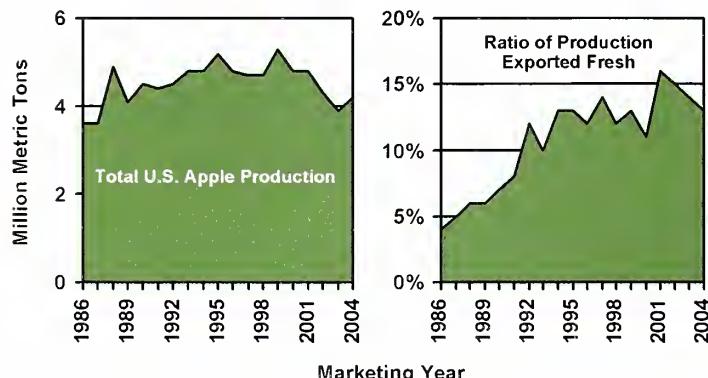
U.S. Volume Trade in Apples



Source: Bureau of the Census, DOC

Note-Marketing year is July-June. *Data for MY 2004 is a forecast.

U.S. Apple Production and Percent of the Crop Exported Fresh

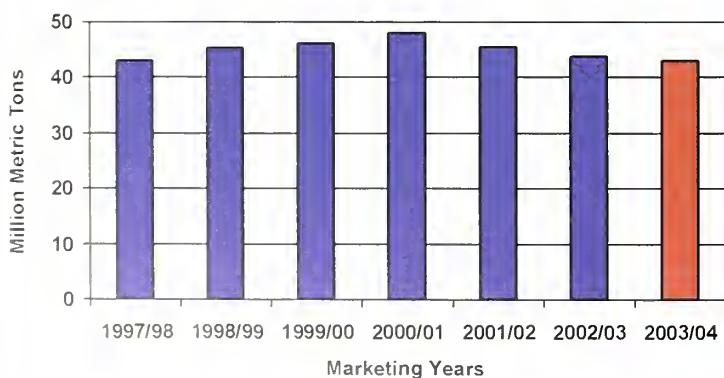


Source: National Agricultural Statistics Service, USDA

Bureau of the Census, DOC

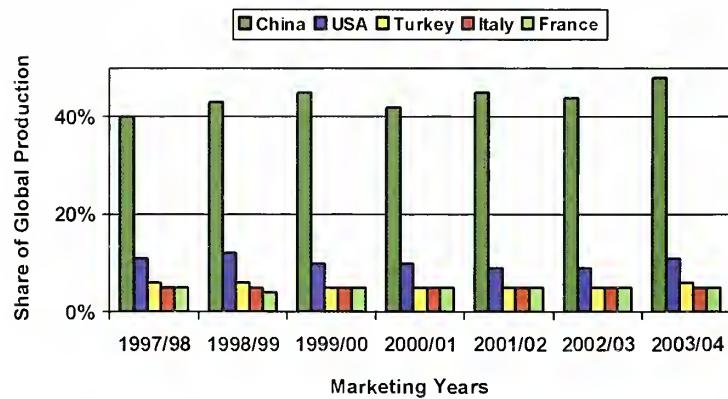
Note- Marketing year is July-June

World Apple Production



Source: FAS Agricultural Attaché reports and the U.S. National Agricultural Statistics Service
Note- World or global estimates for the purpose of this document are based on data from more than 30 major apple-producing and trading countries. Marketing year is July-June for Northern Hemisphere countries. Data for MY 2003/04 is a forecast.

Key Apple Producers' Share of World Production



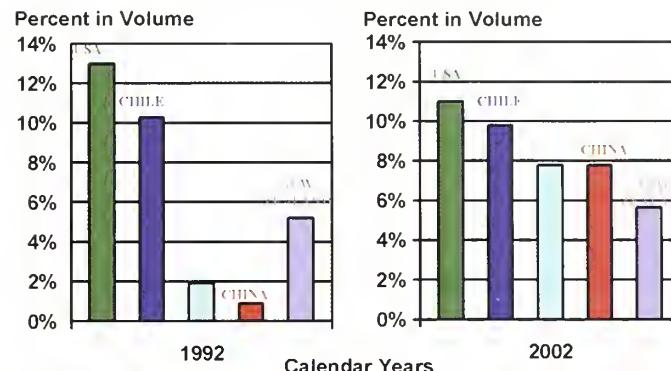
Source: FAS Agricultural Attaché reports and the U.S. National Agricultural Statistics Service
Note-Marketing year is July-June. Data for MY 2003/04 is a forecast.

U.S. Apple Exports: Value and Export Value Share



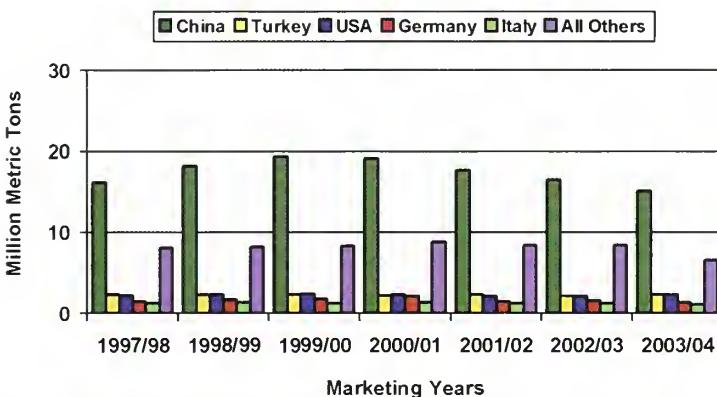
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Share of World Apple Exports Declines Share of China and EU-Extra Trade Increasing Dramatically



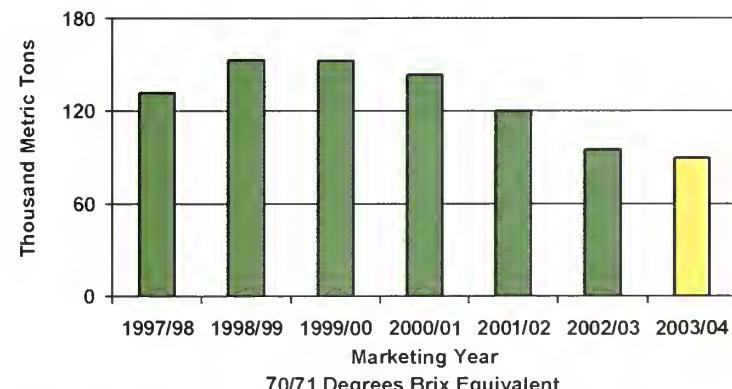
Source: Food and Agriculture Organization (FAO) of the United Nations
Excludes EU Intra-Trade

Top Fresh Apple Consumers



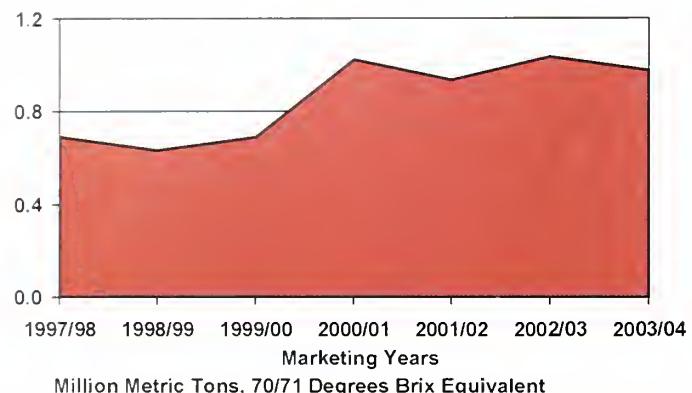
Source: FAS Agricultural Attaché reports and FAS estimates.
Note- Marketing year for Northern Hemisphere countries is July-June.
Data for MY 2003/04 is a forecast.

U.S. Production of Apple Juice



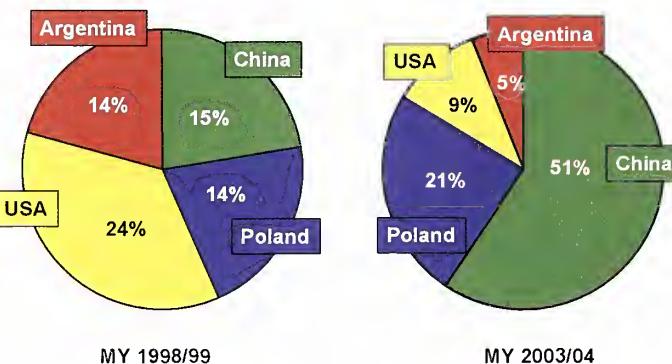
Source: FAS estimates using data from the U.S. National Agricultural Statistics Service
Note- Marketing year is July-June. Data for MY 2003/04 is a forecast.

World Apple Juice Production



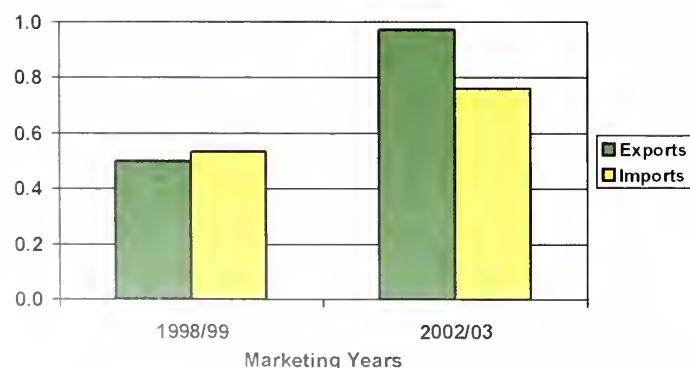
Source: FAS Agricultural Attaché reports and FAS estimates
Note- Marketing year for Northern Hemisphere countries is July-June. Data for MY 2003/04 is a forecast.

Top Apple Juice Producers' Share of World Production



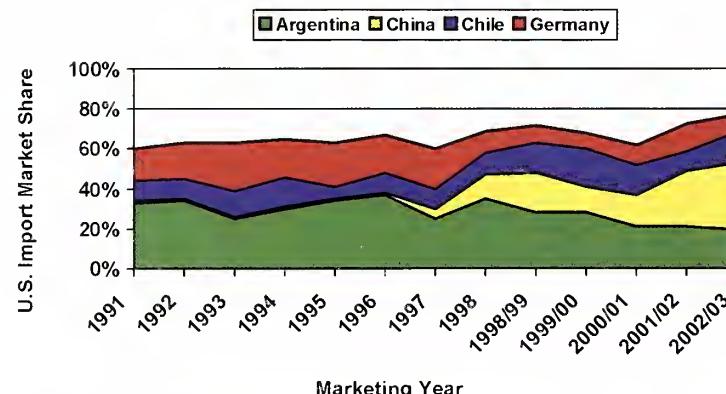
Source: FAS Agricultural Attaché reports and the National Agricultural Statistics Service, USDA
Note- Marketing year for Northern Hemisphere countries is July-June. Data for MY 2003/04 is a forecast.

World Trade in Apple Juice



Source: FAS Agricultural Attaché reports and the Bureau of the Census, DOC
Note- Marketing year for Northern Hemisphere countries is July-June. Data for MY 2002/03 is an estimate.

Import Share of U.S. Top Apple Juice Suppliers

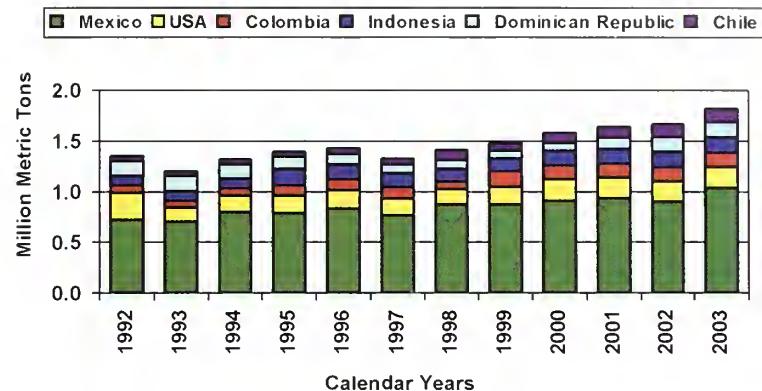


Source: Bureau of the Census, DOC
Note- Marketing year is July-June.

The U.S. and World Situation: Avocados

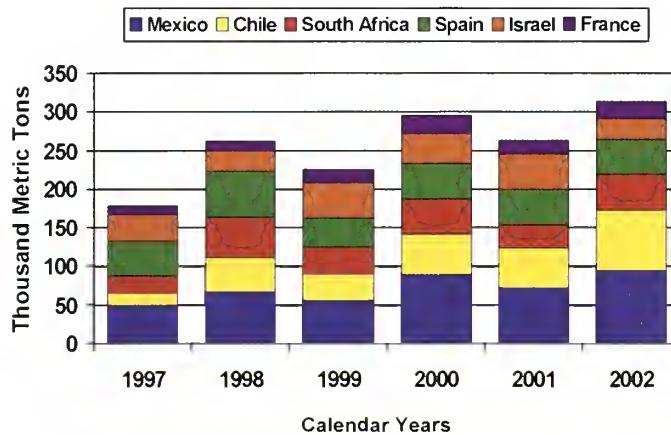
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Top Avocado Producers



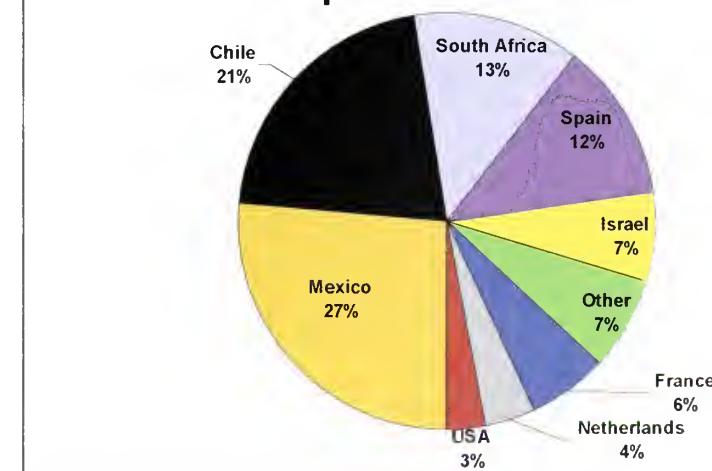
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Avocado Exporters



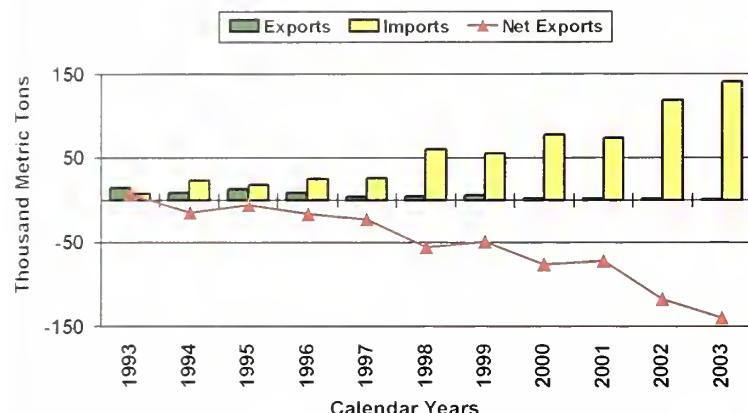
Source: Global Trade Atlas and FAS Attaché Reports

Export Share of Major Avocado Exporters in 2002



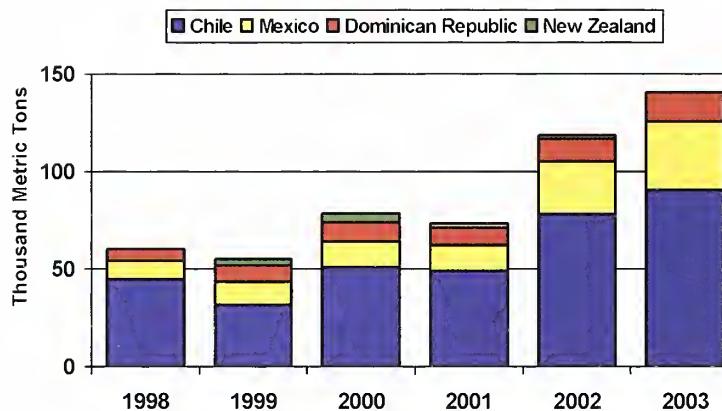
Source: Global Trade Atlas and FAS Attaché Reports

U.S. Trade in Avocados



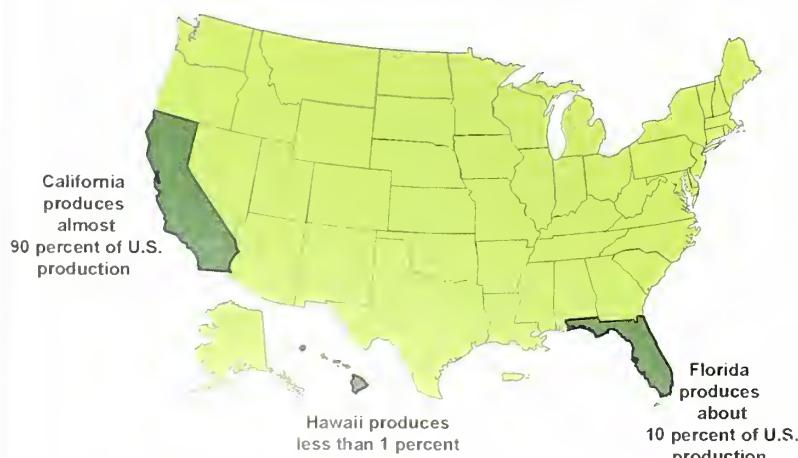
Source: Bureau of the Census, DOC

U.S. Avocado Import Market: Top Suppliers



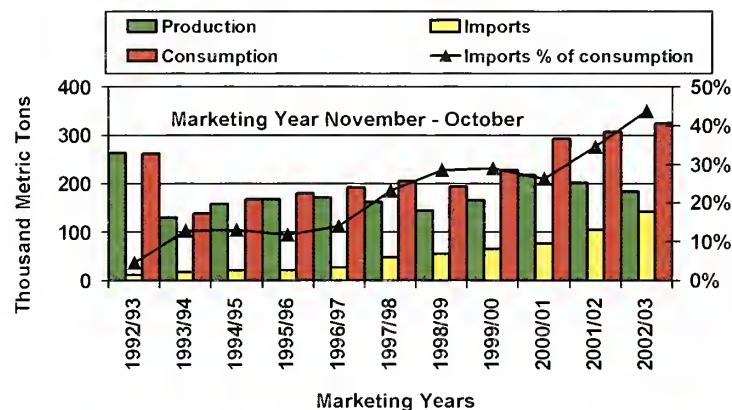
Source: Bureau of the Census, DOC

U.S. Top Avocado Producing States



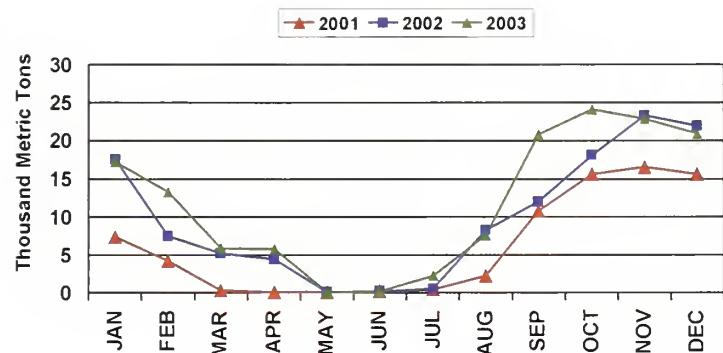
Source: National Agricultural Statistics Service, USDA

U.S. Avocado Production, Consumption, and Imports



Source: U.S. Agricultural Attaché Reports

U.S. Monthly Avocado Imports

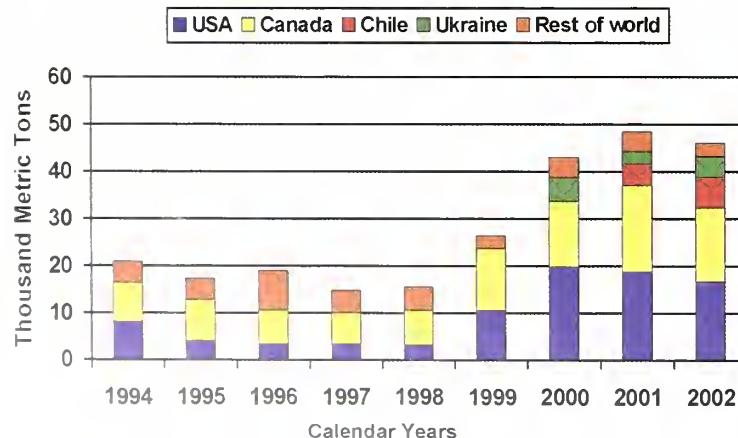


Source: Bureau of the Census, DOC

The U.S. and World Situation: Blueberries

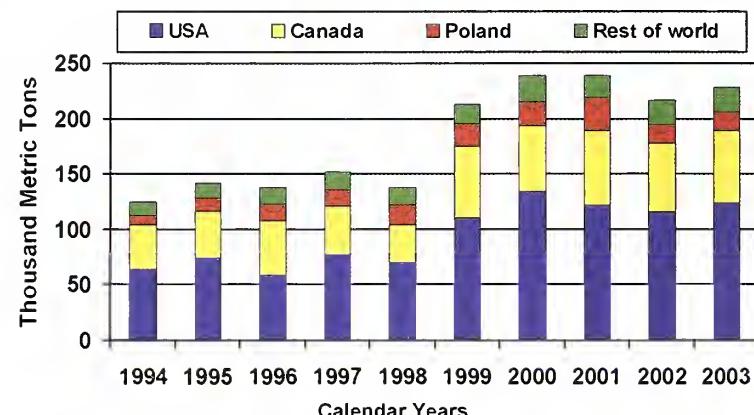
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Top Exporters of Blueberries



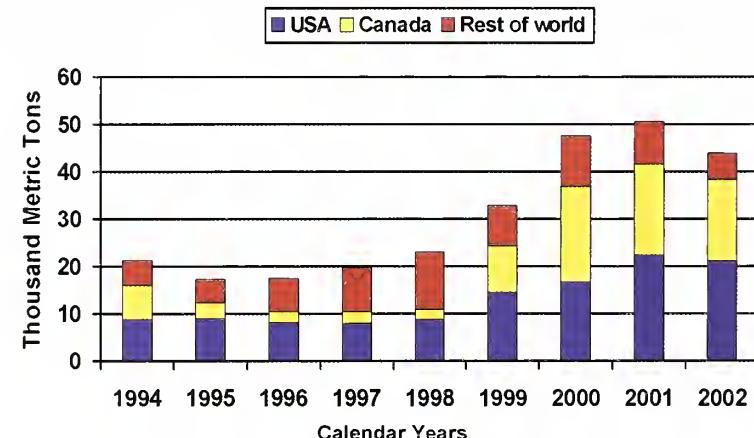
Source: Food and Agriculture Organization (FAO) of the United Nations

Global Fresh Blueberry Production



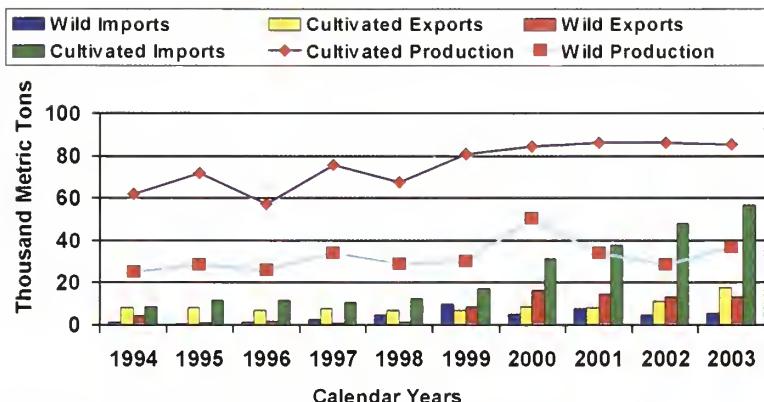
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Importers of Blueberries



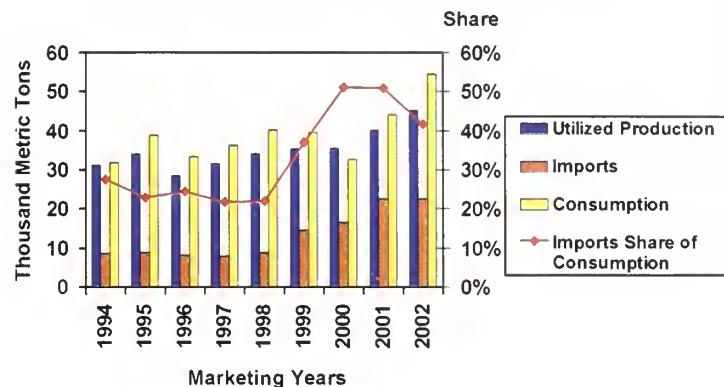
Source: Food and Agriculture Organization (FAO) of the United Nations

The U.S. Fresh Blueberry Market



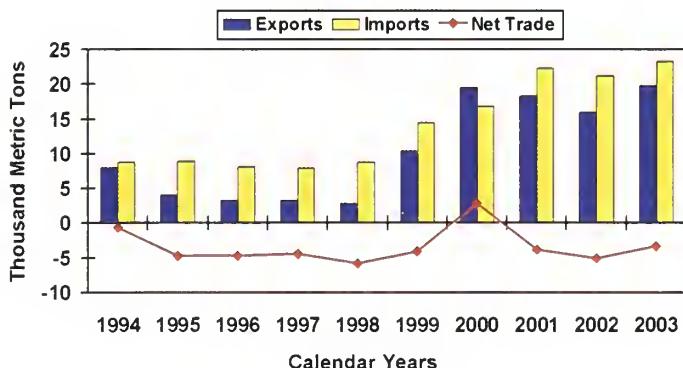
Source: Economic Research Service, USDA; National Agricultural Statistics Service, USDA; Bureau of the Census, DOC

U.S. Fresh Blueberry Production, Consumption, and Imports



Source: Economic Research Service, USDA

U.S. Trade Balance in Fresh Blueberries



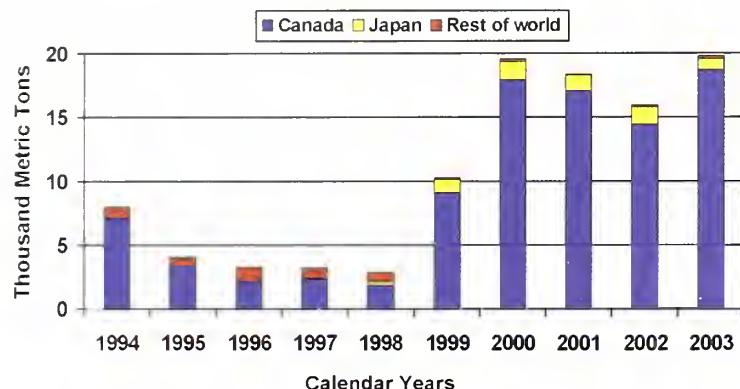
Source: Bureau of the Census, DOC

U.S. Blueberry Exports: Value and Export Value Share



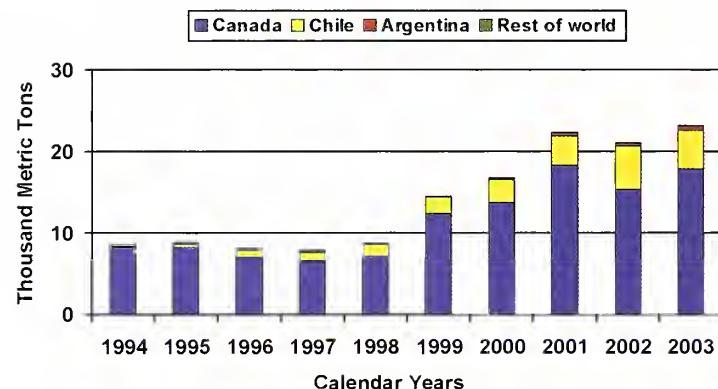
Source: Food and Agriculture Organization (FAO) of the United Nations

Top U.S. Fresh Blueberry Export Markets



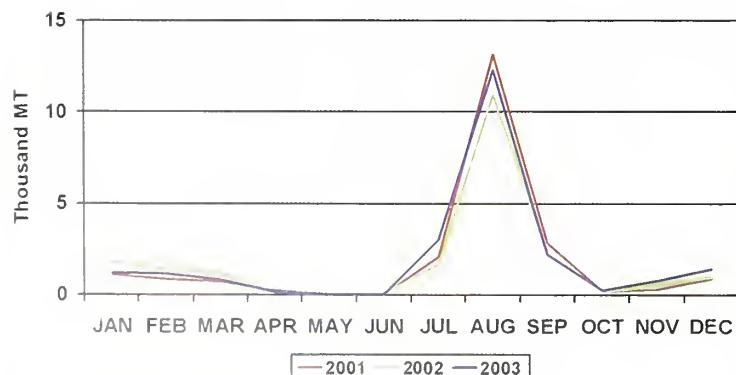
Source: Bureau of the Census, DOC

Origin of U.S. Imported Fresh Blueberries



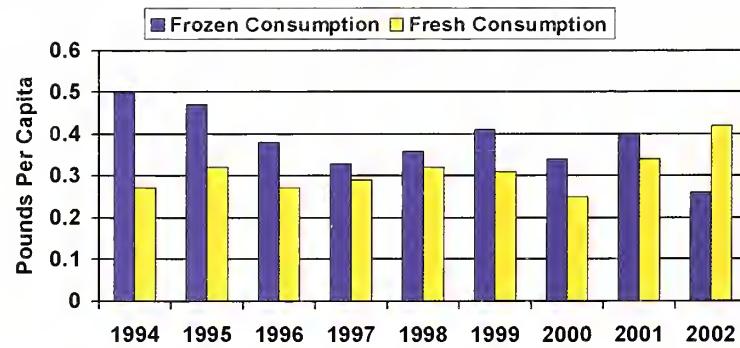
Source: Bureau of the Census, DOC

U.S. Monthly Imports of Fresh Blueberries



Source: Bureau of the Census, DOC

U.S. Fresh and Frozen Blueberry Consumption



Source: Economic Research Service,
USDA

U.S. Cultivated and Wild Blueberry Producing States

2002 SHARE

AL - <1%
AR - 1%
FL - 2%
GA - 9%
IN - 2%
MI - 34%
NJ - 22%
NY - 1%
NC - 8%
OR - 15%
WA - 7%



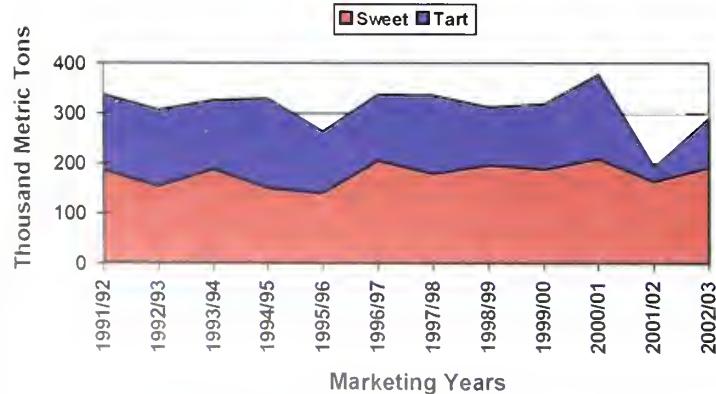
Maine produces 100% of the U.S. wild blueberry crop.

Source: National Agricultural Statistics Service, USDA

The U.S. and World Situation: Cherries

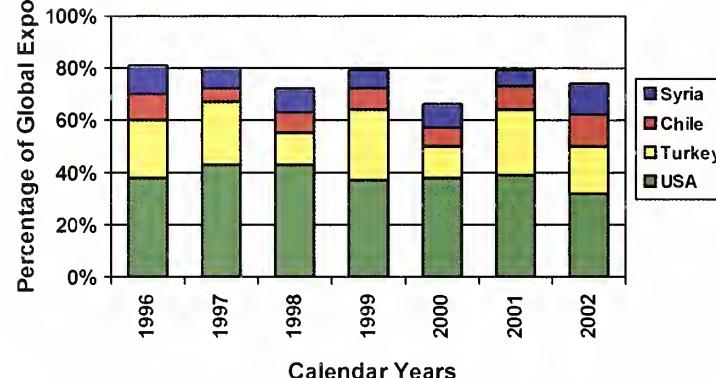
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

U.S. Cherry Production



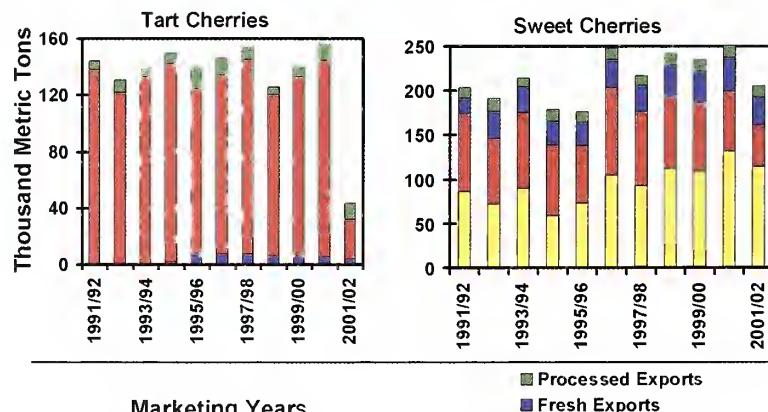
Source: National Agricultural Statistics Service, USDA
Note- Marketing year is May-April

Major Exporters' Share of World Cherry Shipments



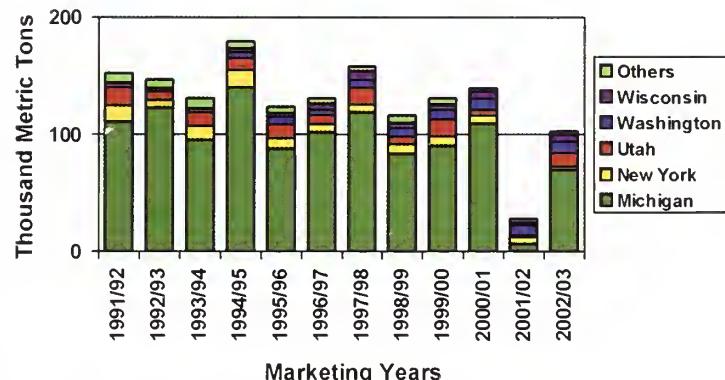
Source: Food and Agriculture Organization (FAO) of the United Nations
Note- Excluding EU intra-trade.

U.S. Domestic Cherry Utilization

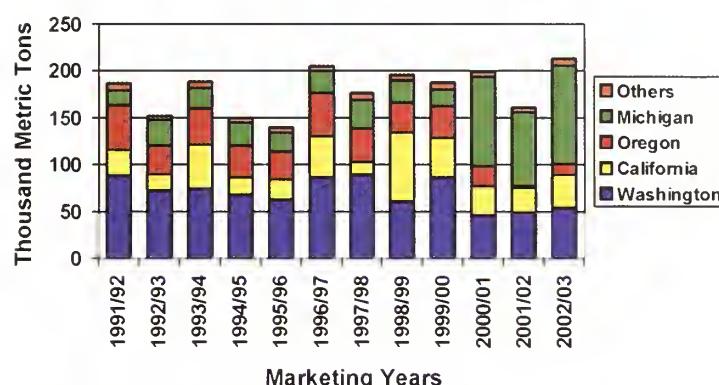


Source: National Agricultural Statistics Service, USDA
Bureau of the Census, DOC
Note- Marketing year is July-June

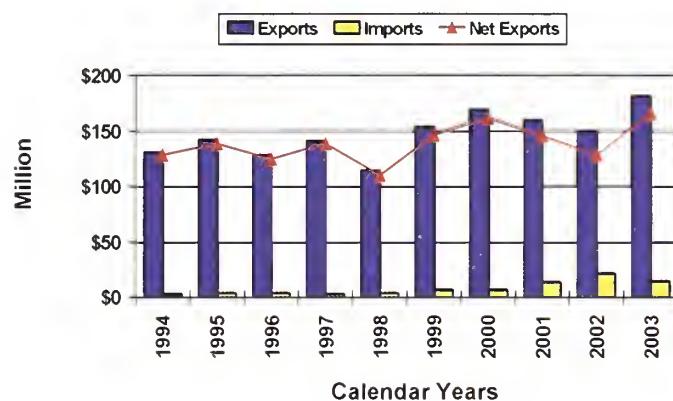
U.S. Tart Cherry Production by Leading Producing States



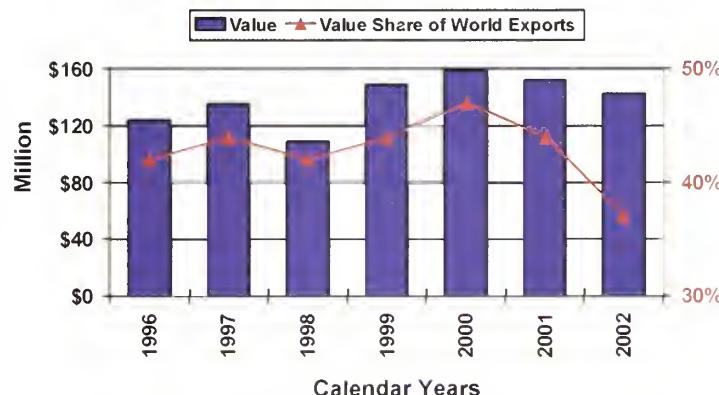
U.S. Sweet Cherry Production by Leading Producing States



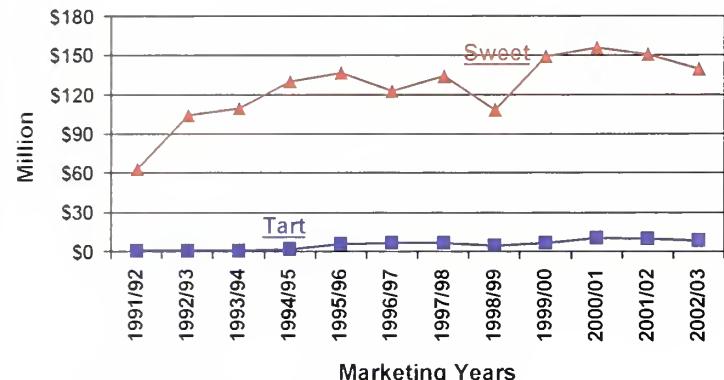
U.S. Value Trade in Cherries



U.S. Cherry Exports: Value and Export Value Share

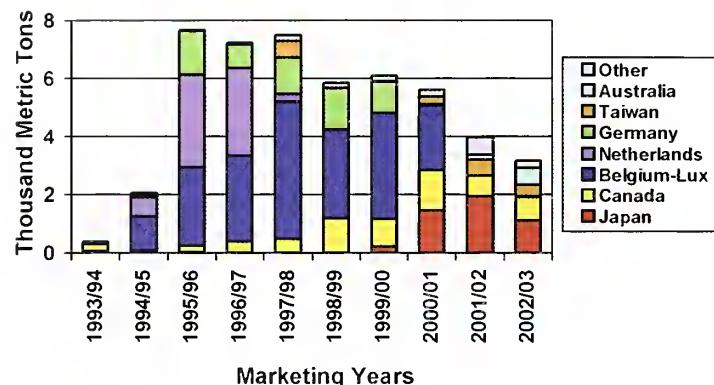


U.S. Cherry Export Values



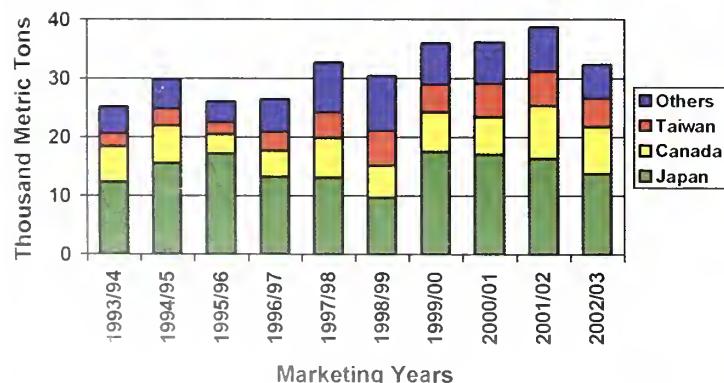
Source: Bureau of the Census, DOC
Note- Marketing year is May-April.

Top U.S.Tart Cherry Export Markets



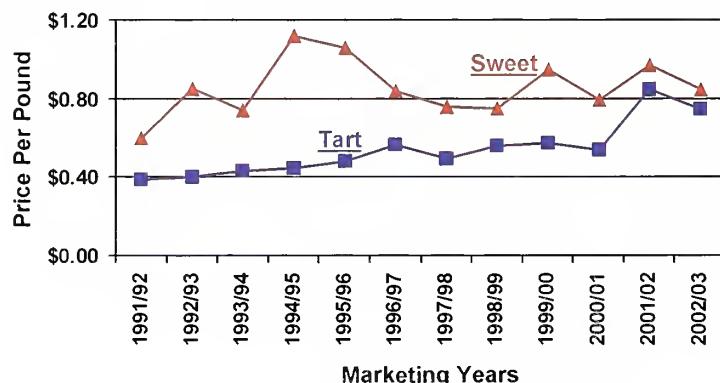
Source: Bureau of the Census, DOC
Note- Marketing year is May-April.

Top U.S. Sweet Cherry Export Markets



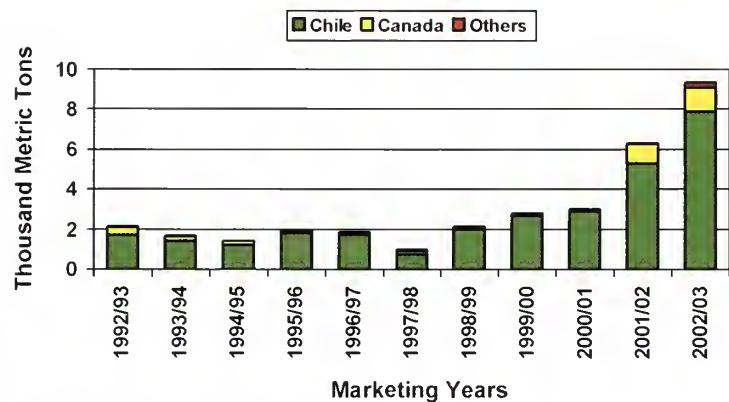
Source: Bureau of the Census, DOC
Note- Marketing year is May-April.

U.S. Sweet and Tart Cherry Prices



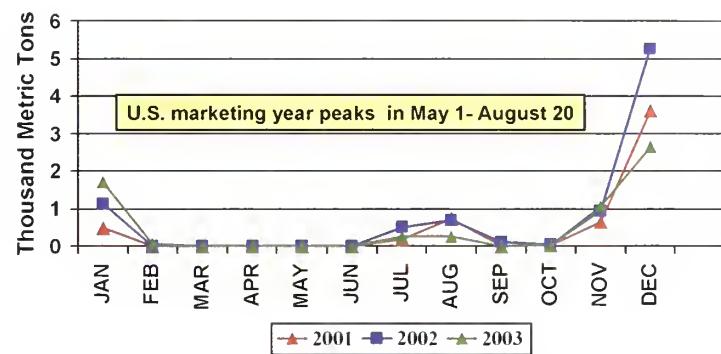
Source: National Agricultural Statistics Service, USDA
Note- Marketing year is May-April.

U.S. Cherry Import Suppliers



Source: Bureau of the Census, DOC
Note- Marketing year is May-April.

U.S. Monthly Cherry Imports

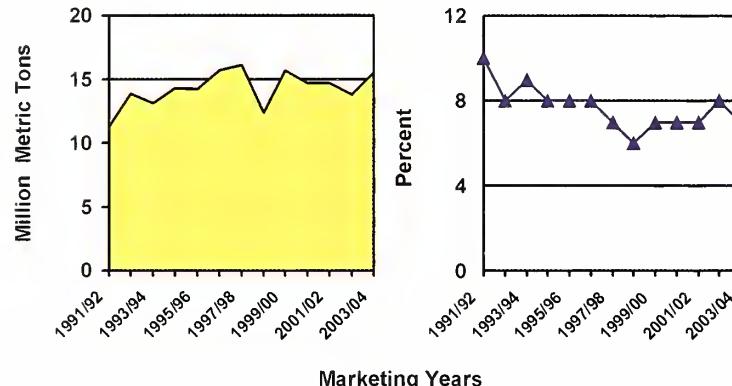


Source: Bureau of the Census, DOC
Note- Marketing year is May-April.

The U.S. and World Situation: Citrus

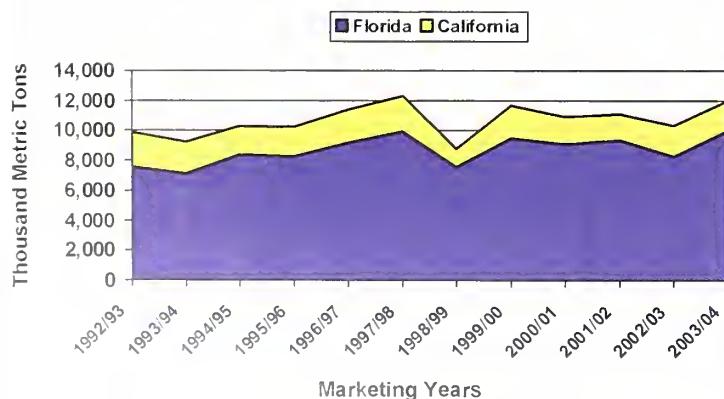
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

U.S. Citrus Production and Percentage of the Crop Exported



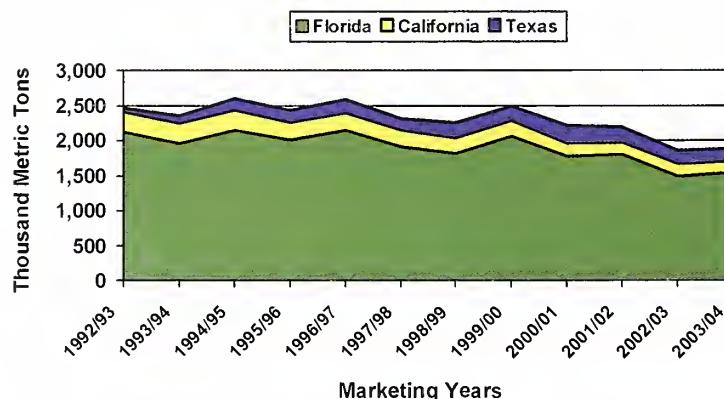
Source: National Agricultural Statistics Service, USDA
Bureau of the Census, DOC
Note—Marketing year varies.

U.S. Orange Production



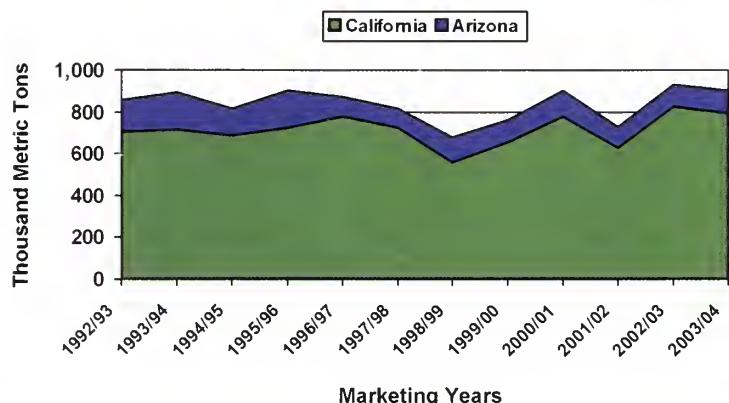
Source: National Agricultural Statistics Service, USDA
Note—Marketing year is November–October.

U.S. Grapefruit Production

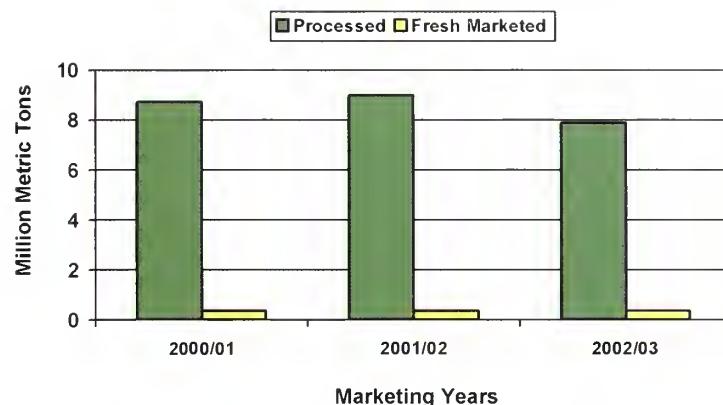


Source: National Agricultural Statistics Service, USDA
Note—Marketing year is September–August.

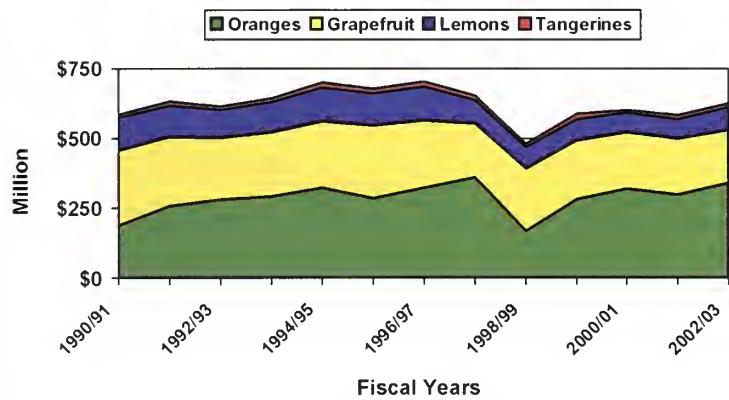
U.S. Lemon Production by State



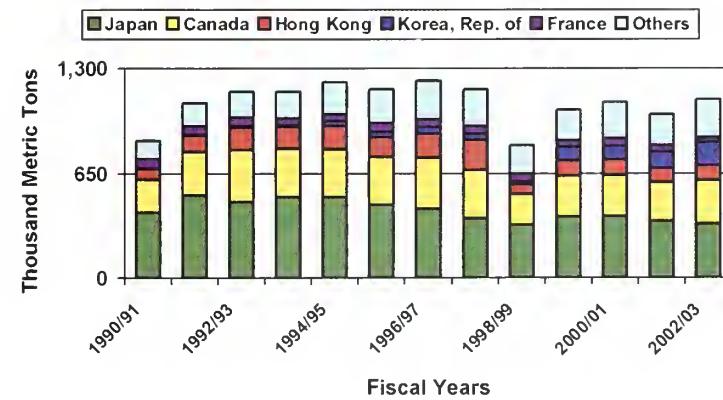
Florida Orange Crop Utilization



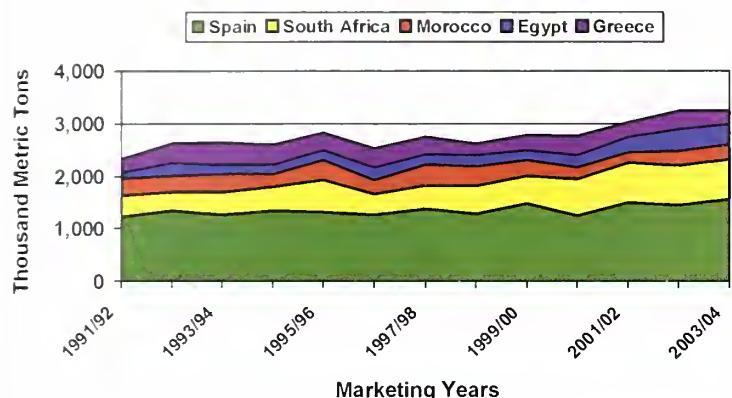
Value of U.S. Citrus Exports



U.S. Citrus Export Markets

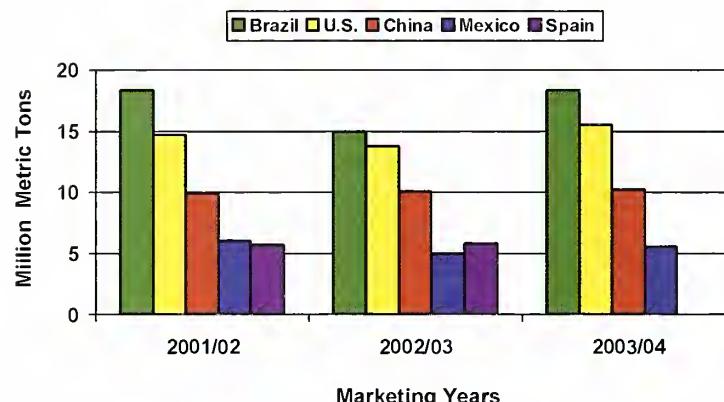


Other Key Exporters of Oranges



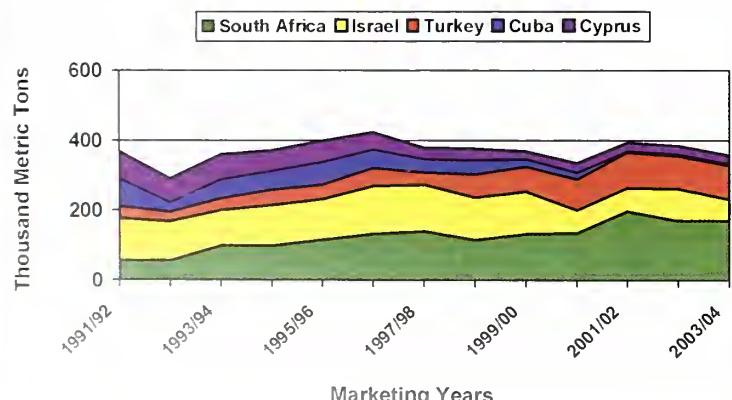
Source: U.S. Agricultural Attaché Reports

Top Citrus Producing Countries



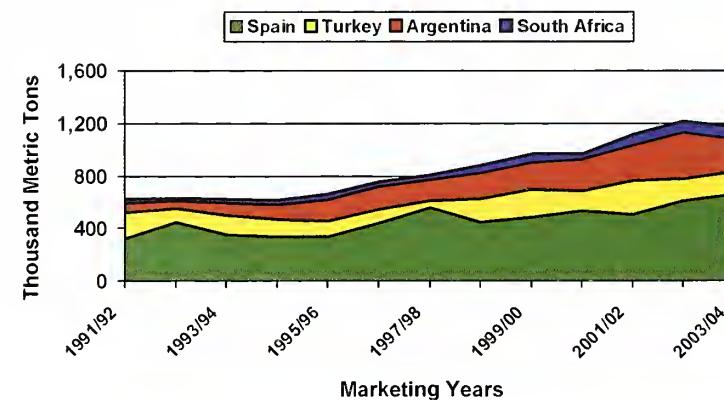
Source: U.S. Agricultural Attaché Reports

Other Top Grapefruit Exporters



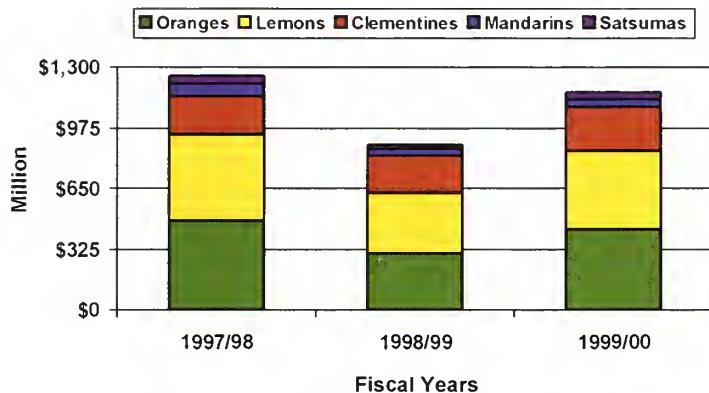
Source: U.S. Agricultural Attaché Reports

Other Top Lemon Exporters



Source: U.S. Agricultural Attaché Reports

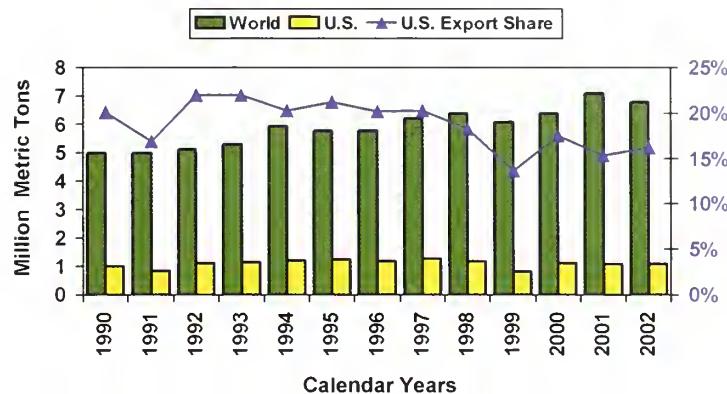
EU Citrus Support



Source: WTO, Committee on Agriculture

Note- The product-specific Aggregate Measurement of Support (AMS) includes market price support, direct payments, and other product-specific support.

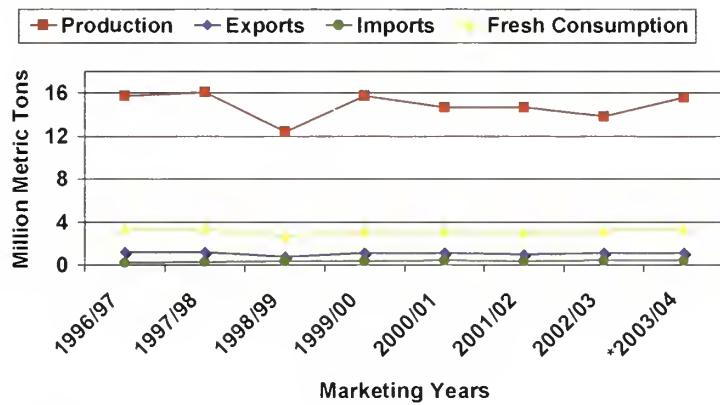
World and U.S. Fresh Citrus Exports



Source: Food and Agriculture Organization (FAO) of the United Nations

Note- Excluding EU intra-trade

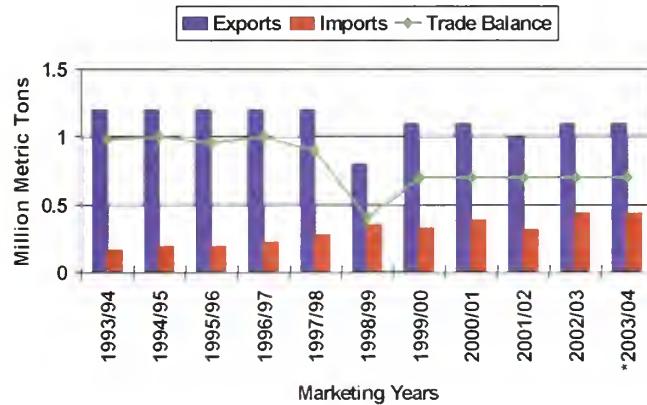
The U.S. Citrus Market



Source: National Agricultural Statistics Service, USDA
Bureau of the Census, DOC

Note – Various marketing years. *Data for MY 2003/04 is a forecast.

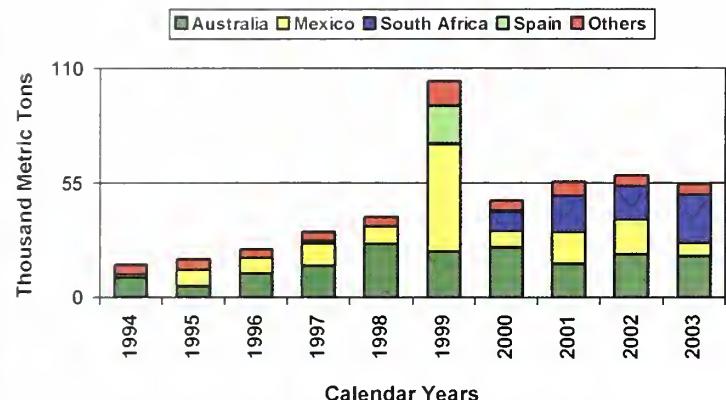
U.S. Volume Trade in Citrus



Source: Bureau of the Census, DOC

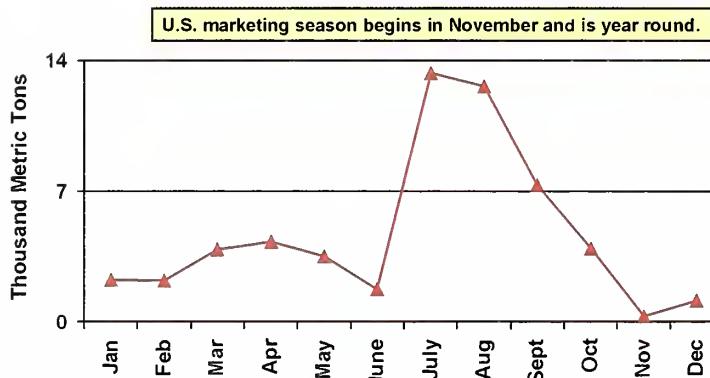
Note – Various Marketing Years. *Data for MY 2003/04 is a forecast.

U.S. Imports of Oranges by Suppliers



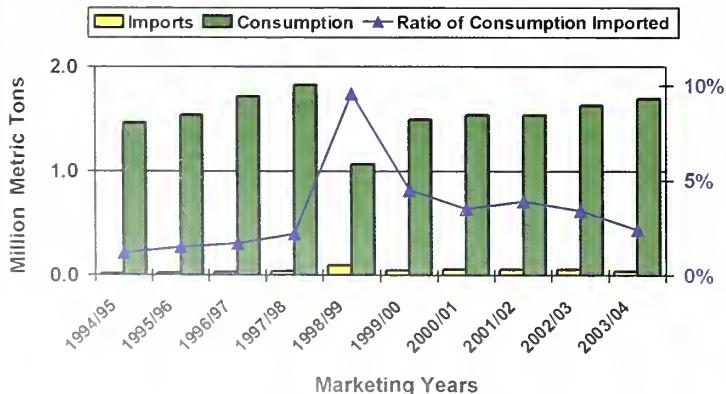
Source: Bureau of the Census, DOC

U.S. Monthly Imports of Oranges



Source: Bureau of the Census, DOC
Note- Monthly average imports for the period 2001-2003.

U.S. Orange Imports and Share of Domestic Consumption



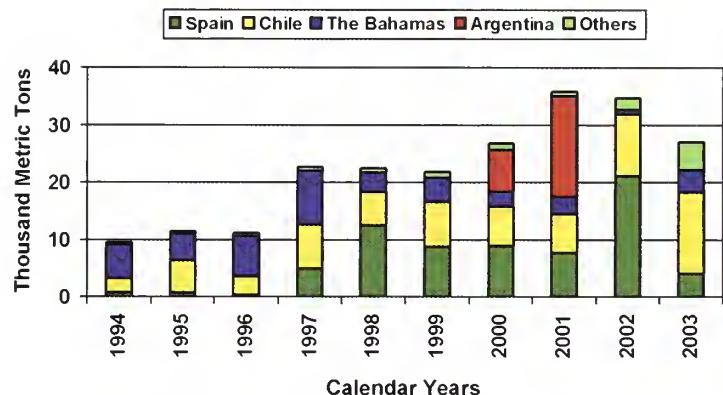
Source: Bureau of the Census, DOC and USDA
Note- Marketing year is November-October.

U.S. Monthly Imports of Grapefruit



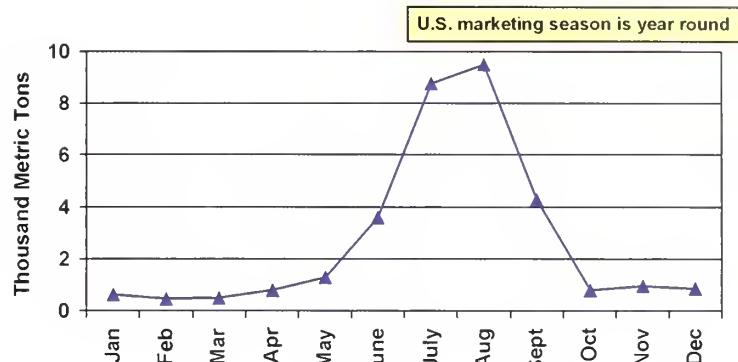
Source: Bureau of the Census, DOC
Note- Monthly average imports for the period 2001-2003.

U.S. Imports of Lemons by Suppliers



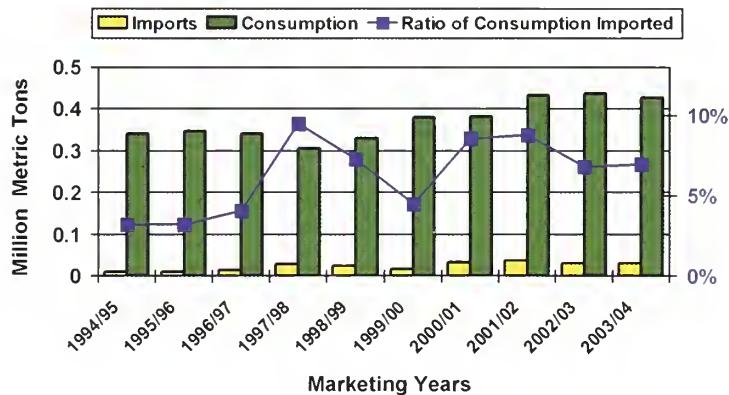
Source: Bureau of the Census, DOC

U.S. Monthly Imports of Lemons



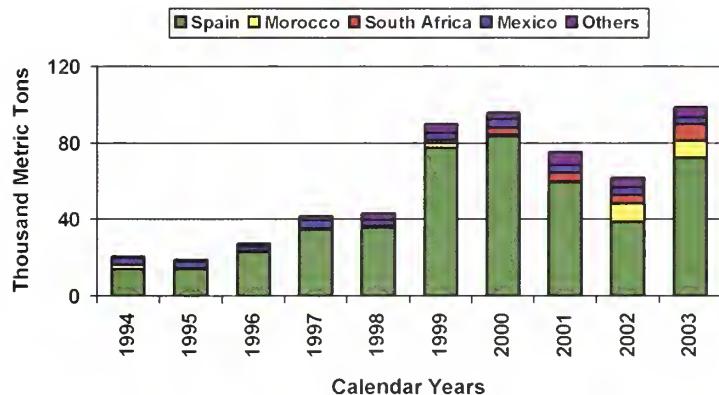
Source: Bureau of the Census, DOC
Note- Monthly average imports for the period 2001-2003.

U.S. Lemon Imports and Share of Domestic Consumption



Source: Bureau of the Census, DOC and USDA
Note- Marketing year is August-July.

U.S. Imports of Tangerines by Suppliers

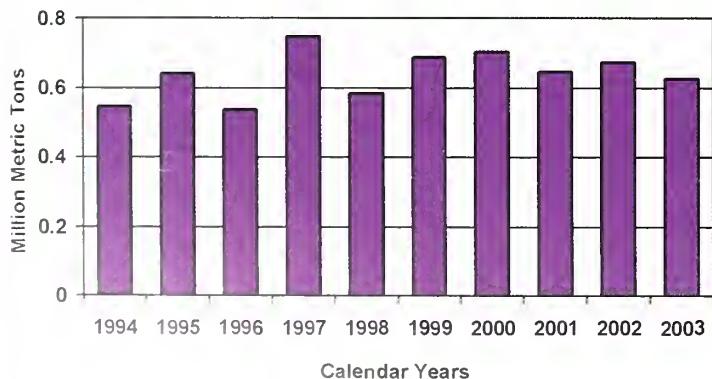


Source: Bureau of the Census, DOC

The U.S. and World Situation: Table Grapes

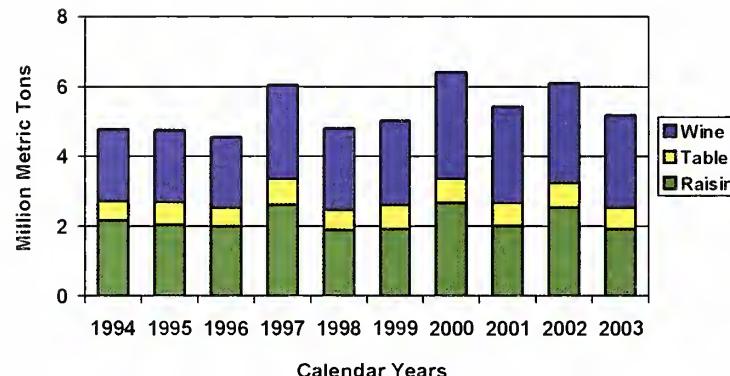
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

California Table Grape Production



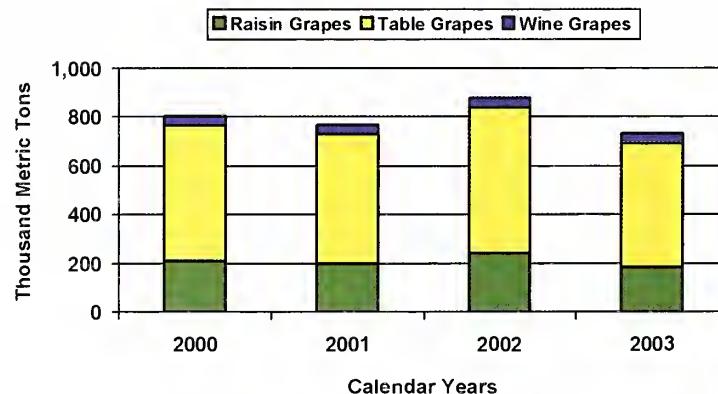
Source: National Agricultural Statistics Service, USDA

California Grape Production (89 Percent of total U.S. Production)



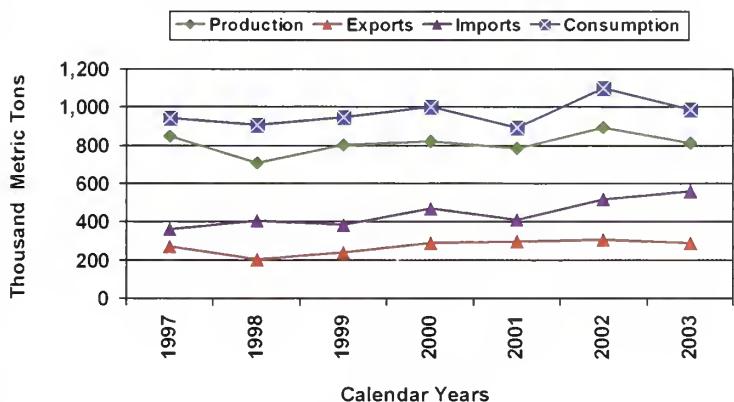
Source: National Agricultural Statistics Service, USDA
Note: Estimates in 2001, 2002, and 2003 includes Texas and Virginia.

California Fresh-Market Grapes Utilization



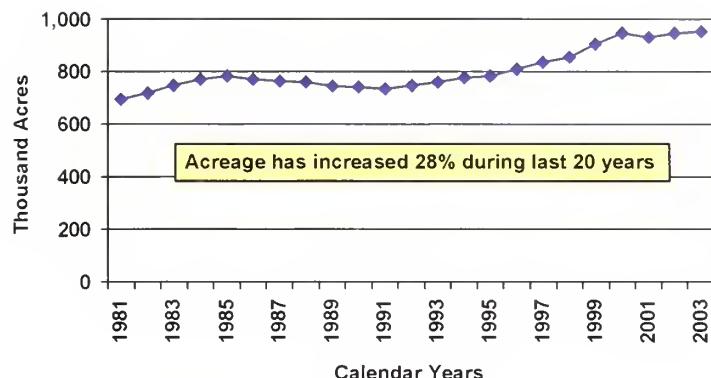
Source: National Agricultural Statistics Service, USDA,
Non-Citrus Fruits & Nuts 2002 Preliminary Summary-January 2004

The U.S. Table Grape Market



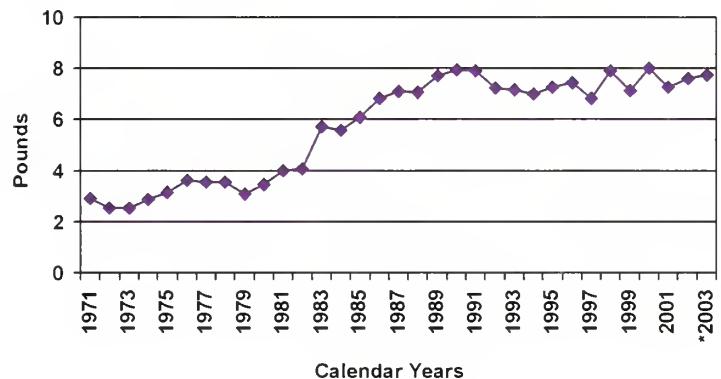
Source: National Agricultural Statistics Service, USDA
Bureau of the Census, DOC

U.S. Grape Bearing Acreage



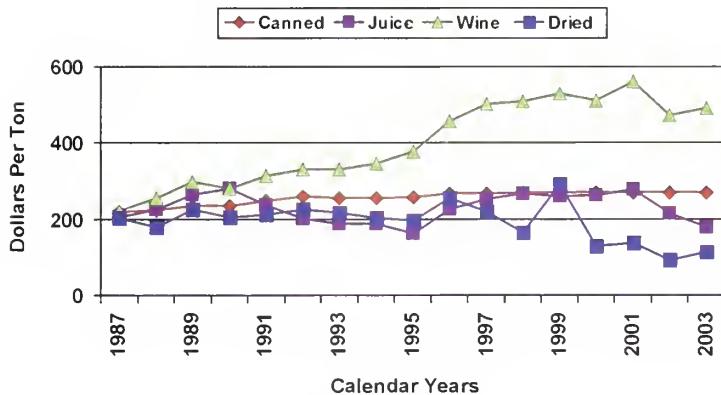
Source: National Agricultural Statistics Service, USDA

U.S. Per Capita Fresh Grape Consumption



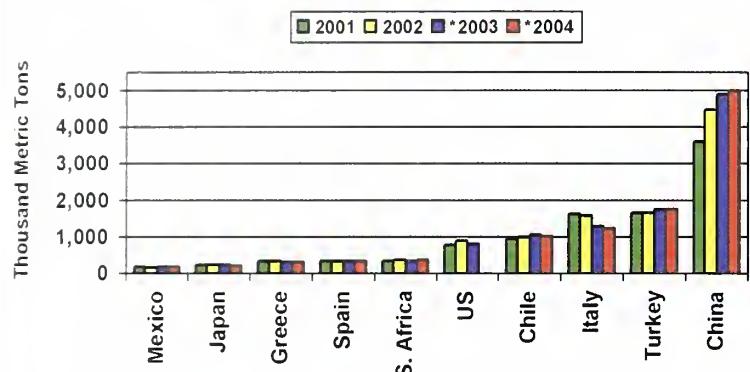
* Estimate
Source: Economic Research Service, USDA

U.S. Grapes: Average Grower Prices



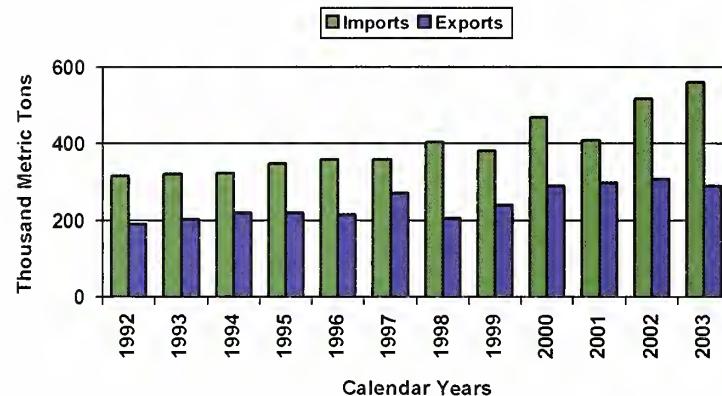
Source: National Agricultural Statistics Service, USDA

World Fresh Table Grape Production



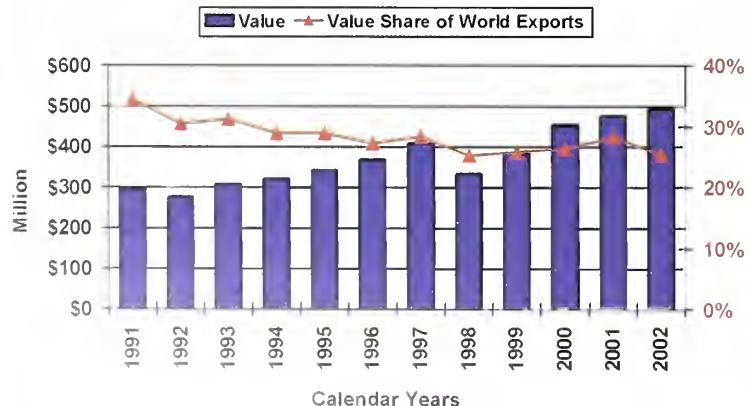
Source: Foreign Agricultural Service (FAS) Attaché Annual Reports, USDA
Note- Data for 2003 and 2004 (*) are estimates.

U.S. Fresh Table Grape Trade Balance



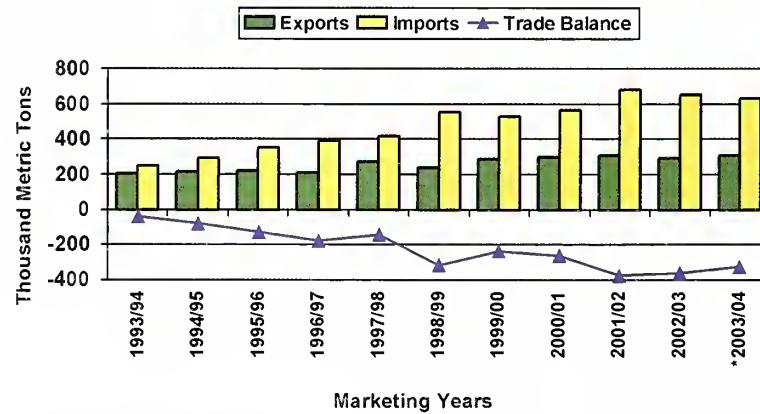
Source: Bureau of the Census, DOC

U.S. Table Grape Exports: Value and Export Value Share



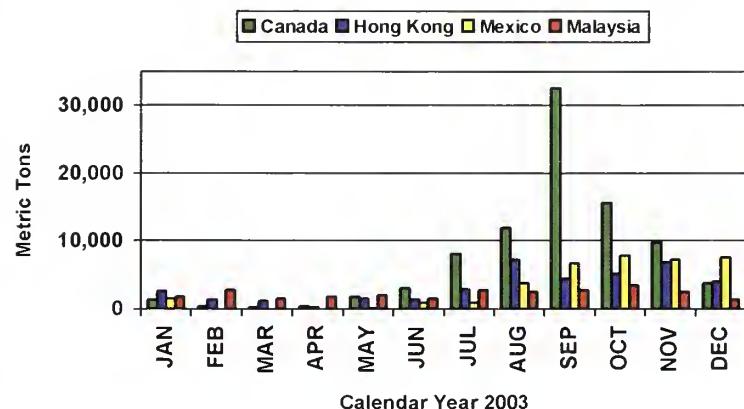
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Volume Trade in Fresh Table Grapes



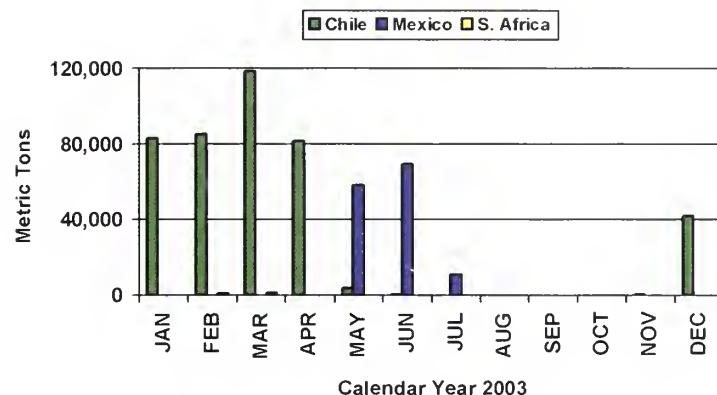
Source: Bureau of the Census, DOC
Note-Marketing year is July-June. *Data for MY 2003/04 is a forecast.

Top U.S. Grape Export Markets



Source: Bureau of the Census, DOC

Top Suppliers of Table Grapes to the U.S. Market

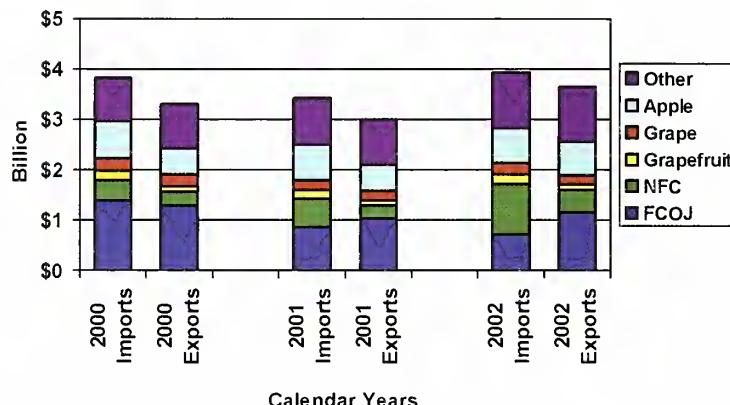


Source: Bureau of the Census, DOC

The U.S. and World Situation: Juices

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

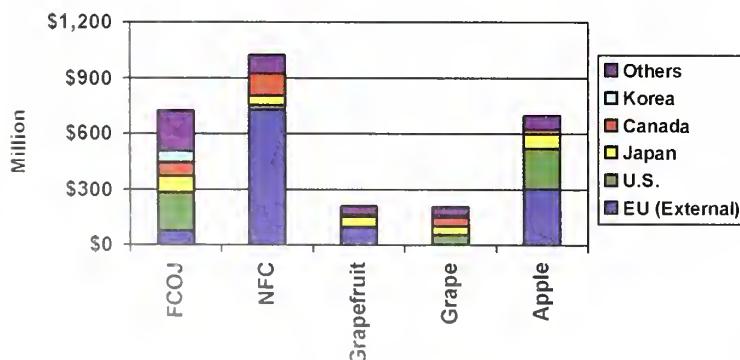
Juices: World Imports and Exports by Type of Juice



Source: Global Trade Atlas

Note- NFC (not from concentrate orange juice) and FCOJ (frozen concentrated orange juice).

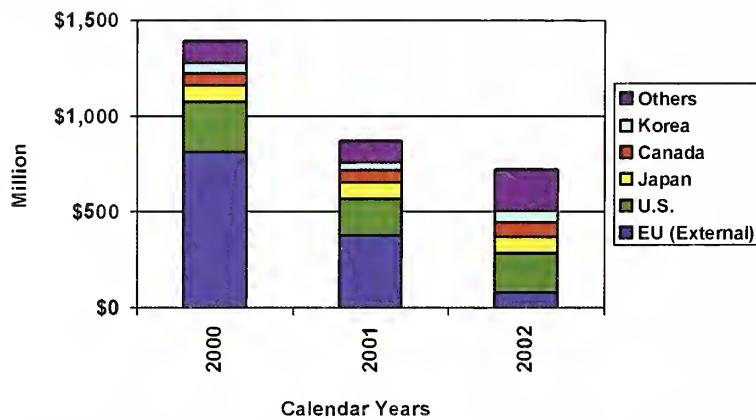
Juices: 2002 World Imports by Top Importers



Source: Global Trade Atlas

Note- NFC (orange juice not-from-concentrate) and FCOJ (frozen concentrated orange juice).

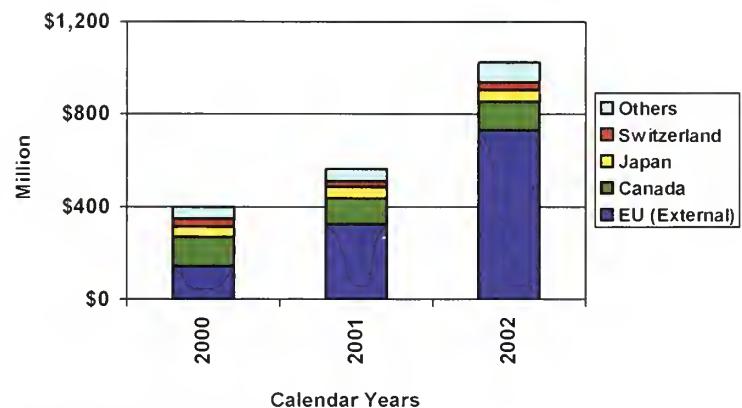
FCOJ: Top Importers



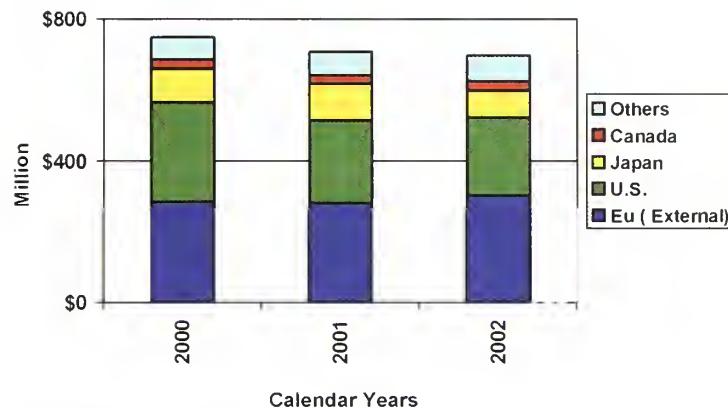
Source: Global Trade Atlas

Note- Others include EU intra-trade.

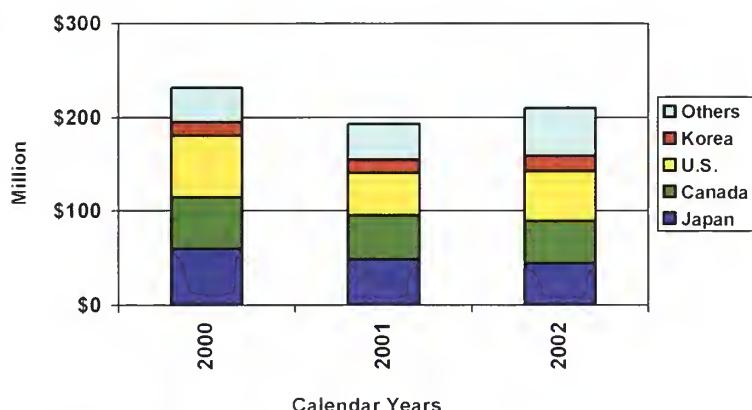
Not Frozen Orange Juice: Top Importers



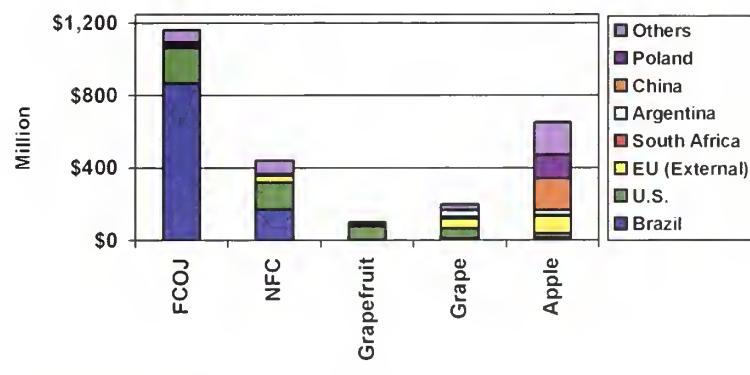
Apple Juice: Top Importers



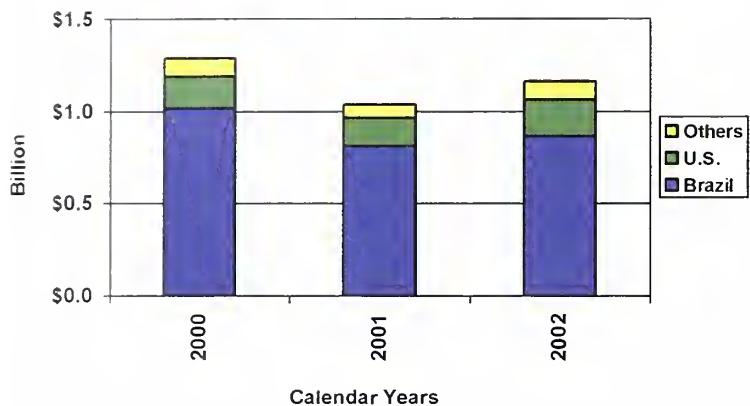
Grape Juice: Top Importers



Juices: 2002 World Exports by Type

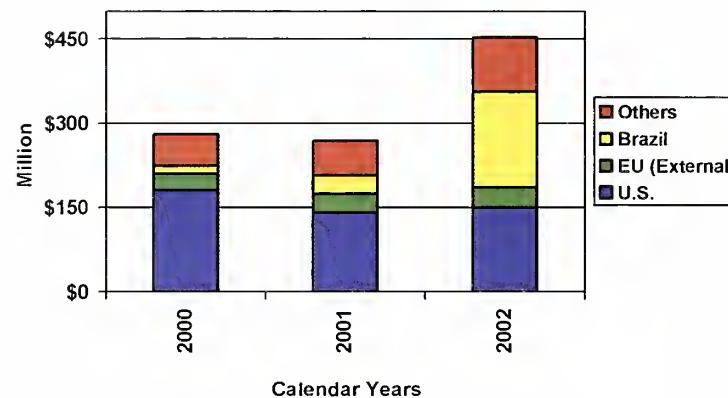


FCOJ: Top Exporters



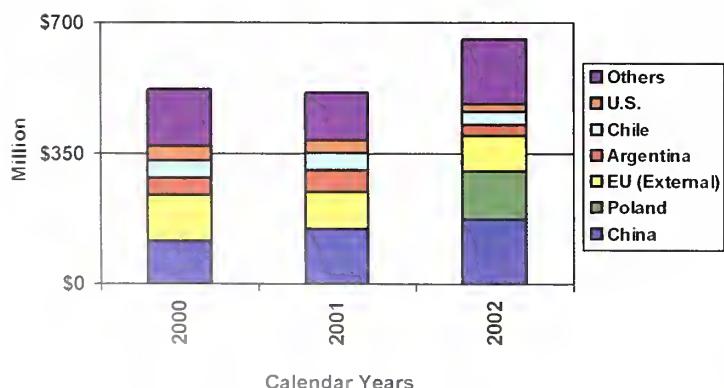
Source: Global Trade Atlas

Not Frozen Orange Juice: Top Exporters



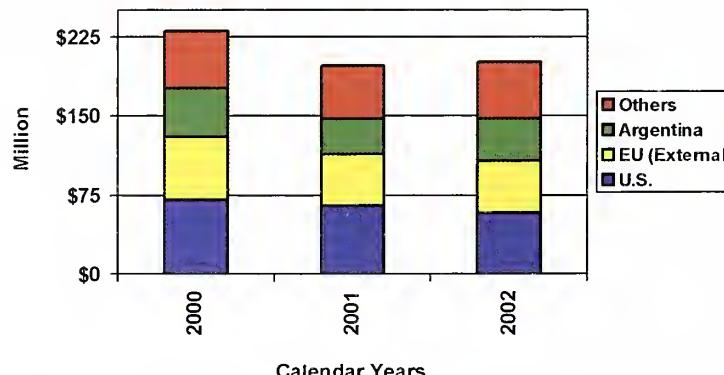
Source: Global Trade Atlas
Note- Others include EU intra-trade.

Apple Juice: Top Exporters



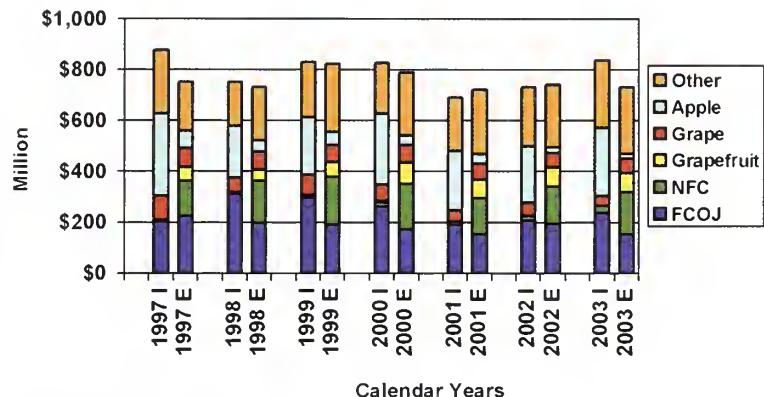
Source: Global Trade Atlas
Note- Others include EU intra-trade. Poland not available for 2000 and 2001.

Grape Juice: Top Exporters



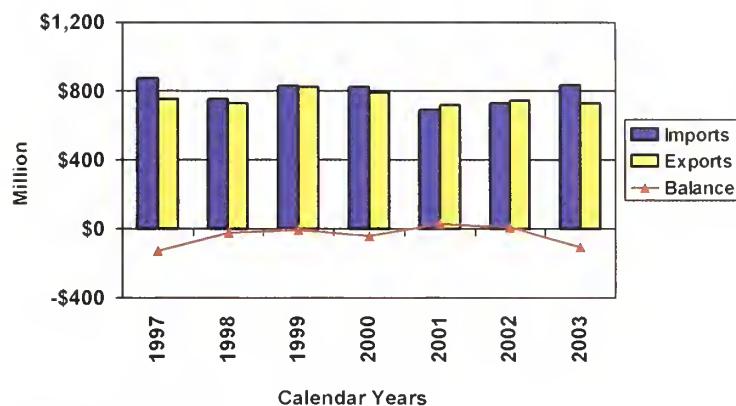
Source: Global Trade Atlas
Note- Others include EU intra-trade.

Juices: U.S. Imports and Exports by Type of Juice



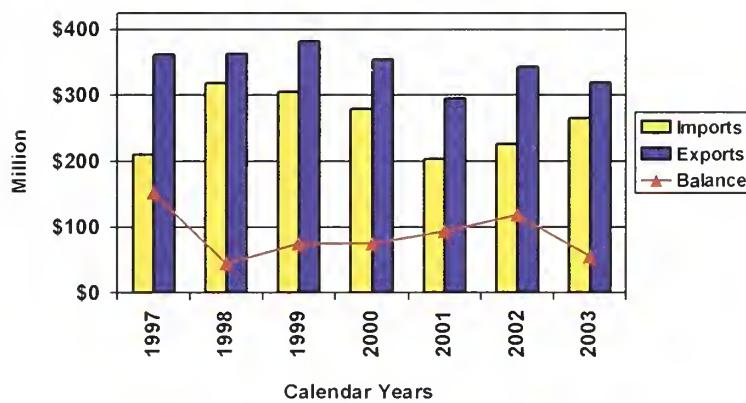
Source: Global Trade Atlas
Note- I=Imports, E=Exports

Juices: U.S. Imports and Exports and Trade Balance



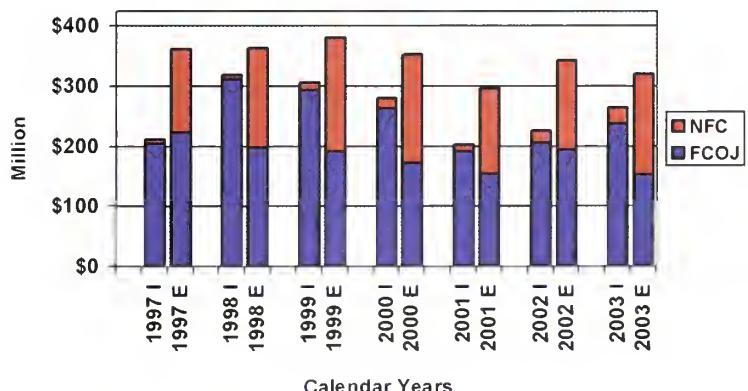
Source: Global Trade Atlas

Orange Juice: U.S. Trade Balance



Source: Global Trade Atlas
Note- Includes both, FCOJ and NFC

Orange Juice: U.S. Trade by Type

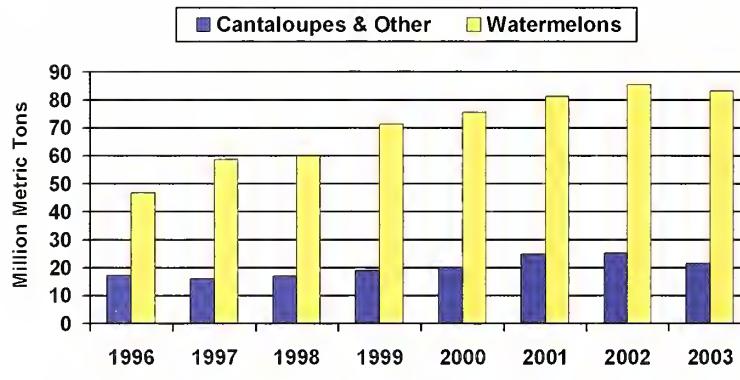


Source: Global Trade Atlas
Note- NFC (orange juice not-from-concentrate) and FCOJ (frozen concentrated orange juice).
I=Imports, E=Exports

The U.S. and World Situation: Melons

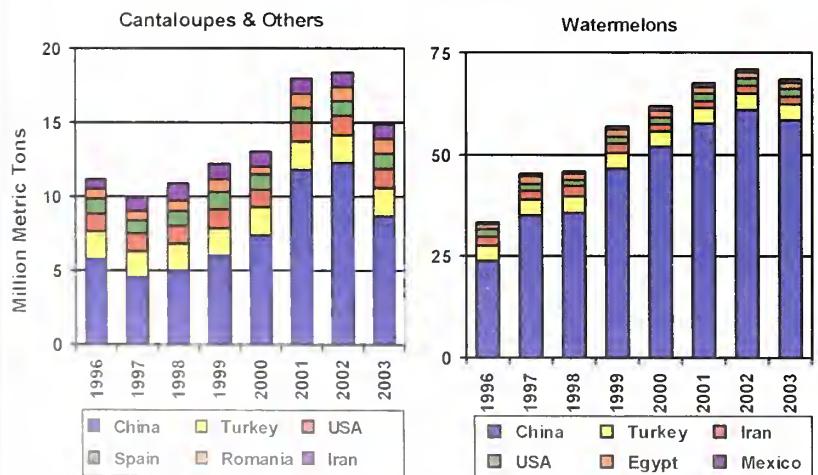
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Global Production of Melons

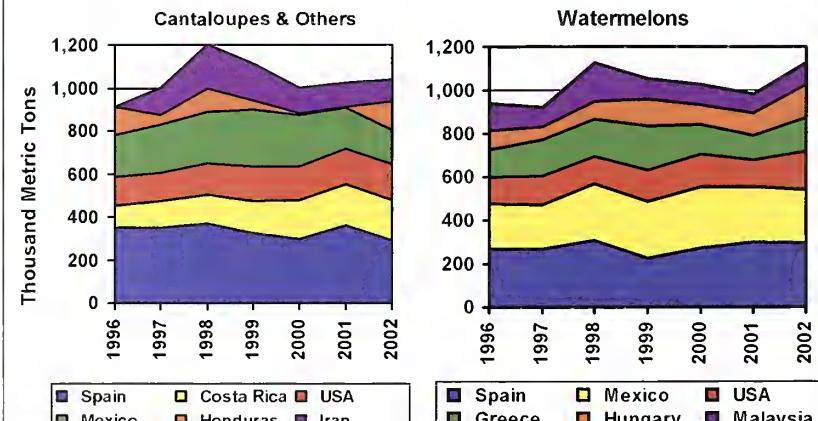


Source: Food and Agriculture Organization (FAO) of the United Nations

Top Melon Producers



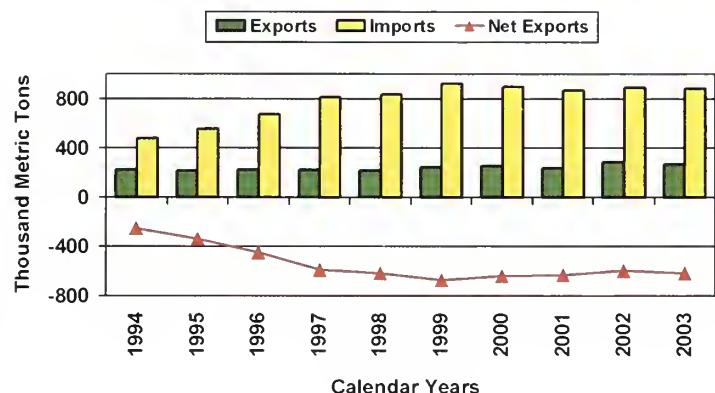
Major Exporters of Melons



Source: Food and Agriculture Organization (FAO) of the United Nations

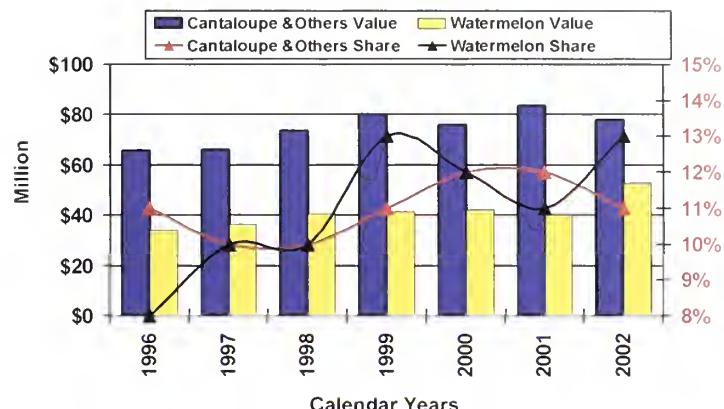
Calendar Years

U.S. Trade in Melons



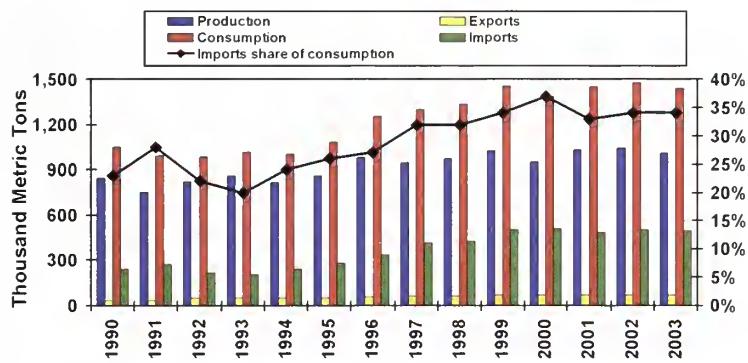
Source: Bureau of the Census, DOC

U.S. Melon Export Values and Share of World Trade



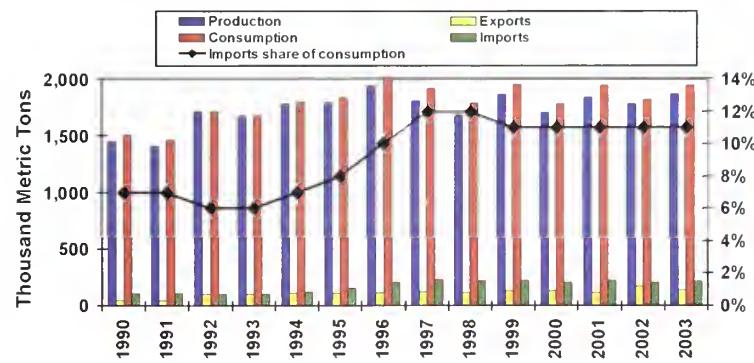
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Cantaloupe Production, Consumption and Trade



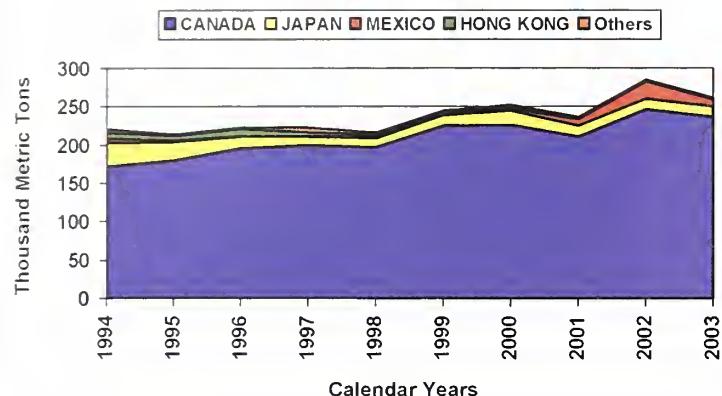
Source: Economic Research Service, USDA

U.S. Watermelon Production, Consumption and Trade



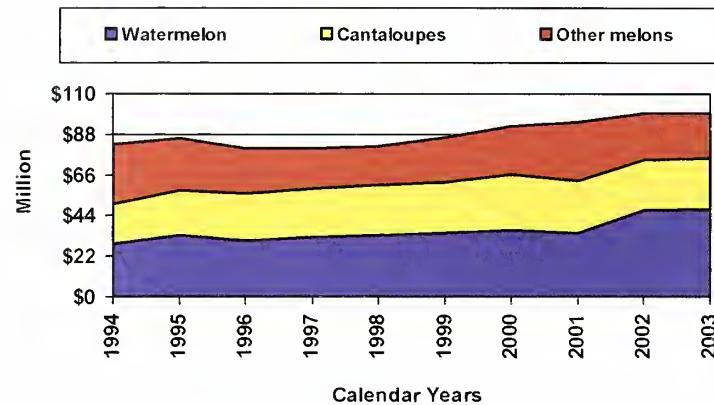
Source: Economic Research Service, USDA

Top Export Markets for U.S. Melons



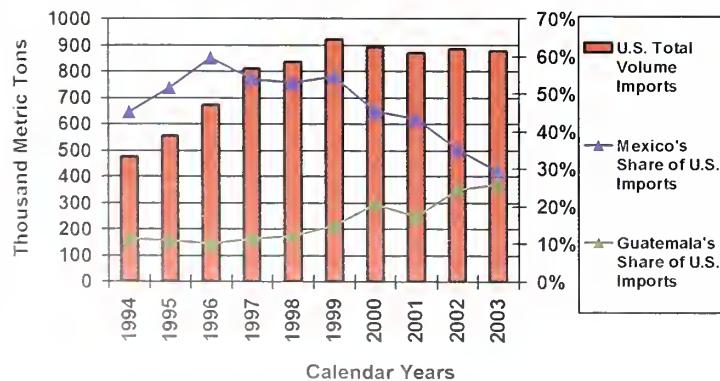
Source: U.S. Department of Commerce, Bureau of the Census

Value of U.S. Melon Exports by Type



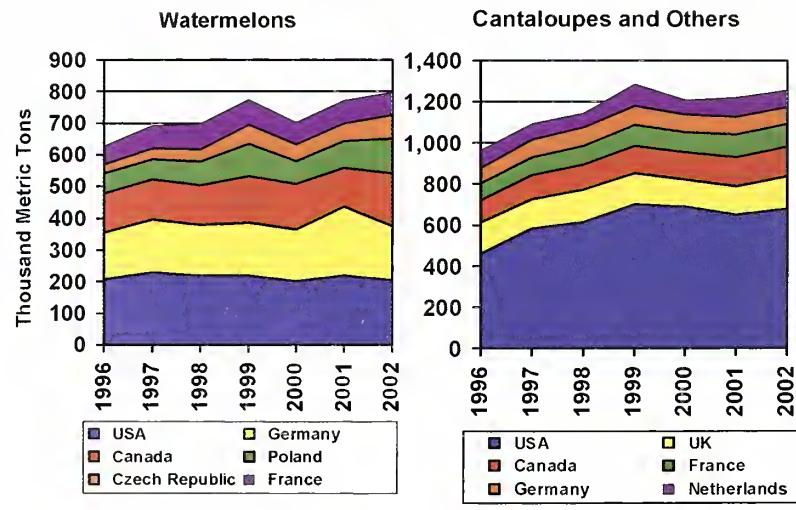
Source: U.S. Department of Commerce, Bureau of the Census

Top Suppliers' Share of the U.S. Melon Import Market



Source: U.S. Department of Commerce, Bureau of the Census

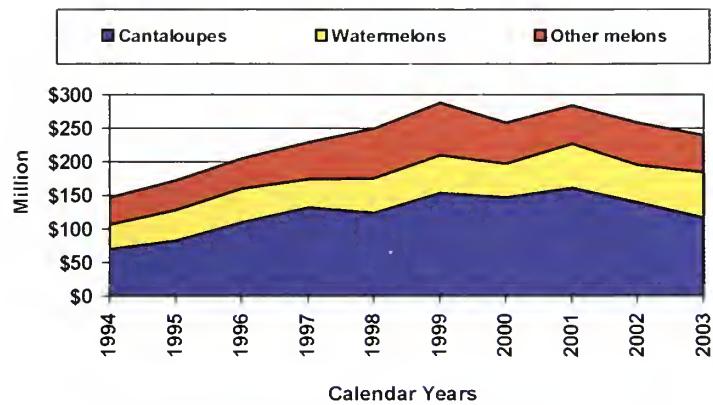
Major Melon Importers



Source: Global Trade Atlas

Calendar Years

Value of U.S. Melon Imports by Type

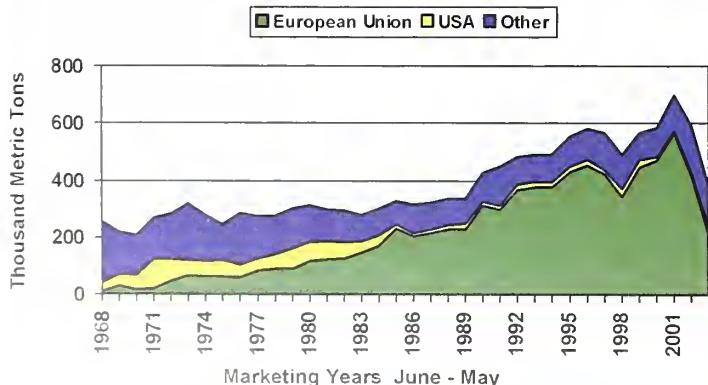


Source: U.S. Department of Commerce, Bureau of the Census

The U.S. and World Situation: Canned Peaches

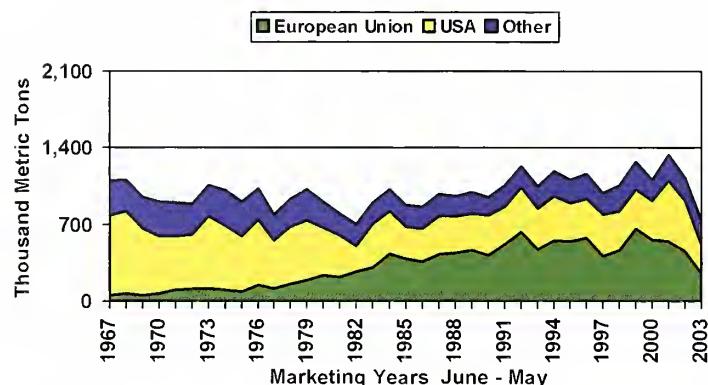
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Canned Peach Exports from Principal Supplying Countries



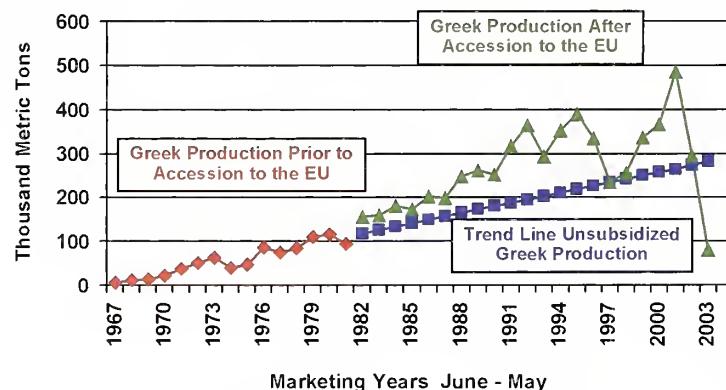
Source: U.S. Agricultural Attaché Reports; Principal supplying countries: US, South Africa, Australia, Argentina, Chile, and EU (Spain, Greece, Italy)

Canned Peach Production In Principal Supplying Countries



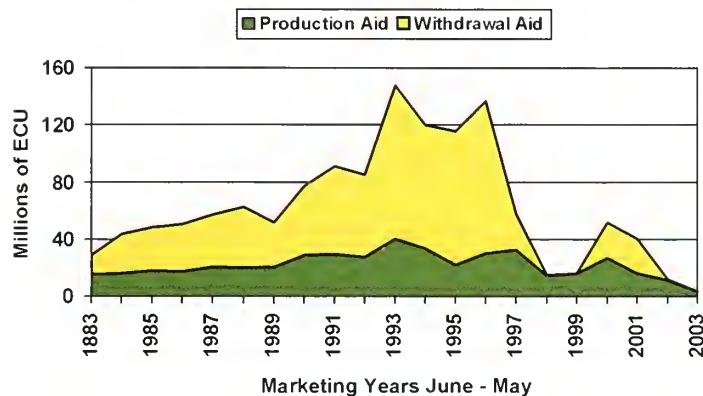
Source: U.S. Agricultural Attaché Reports
Principal supplying countries: USA, South Africa, Australia, Argentina, Chile, and EU (Spain, Greece, Italy)

EU Subsidies Increased Canned Peach Production Over Trend Line



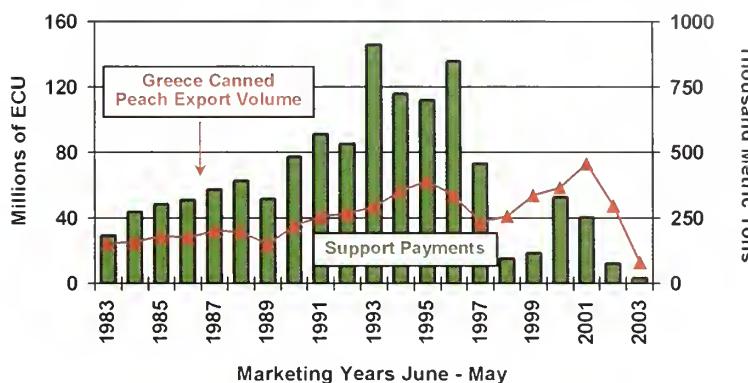
Source: U.S. Agricultural Attaché Reports and EU Commission DG VI July 1997

EU Support Payments: Production and Withdrawal Aids



Source: EU Commission DG VI 1989 through 1995, derived thereafter from EU data

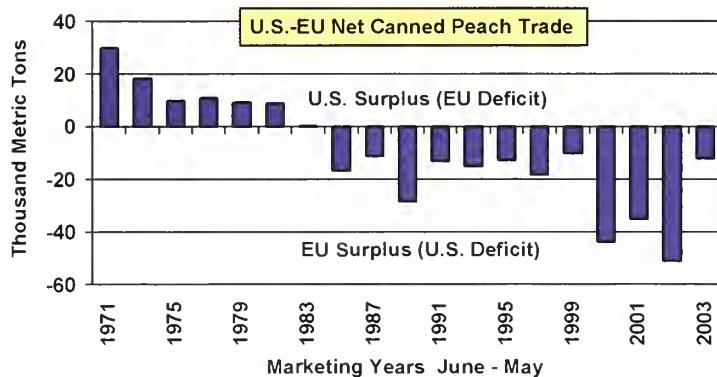
EU Support Payments to Greece and Greek Exports to the World



Source: EU Commission DG VI July 1997

Note: Production aid data in budgetary ECU until MY 1993. Reduced thereafter by double rate coefficient. From MY 1998 on, data are computed from statutory aid and estimate production.

EU Subsidies Reversed U.S.-EU Canned Peach Trade



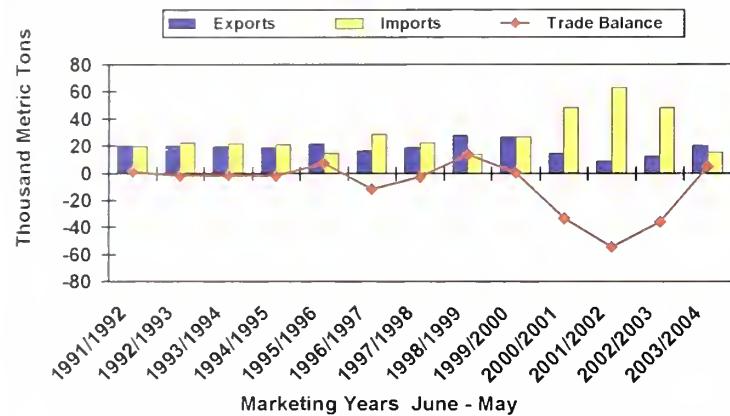
Source: Bureau of the Census, DOC, U.S. Exports minus Imports

U.S. Canned Peaches Export Volume and Export Market Share



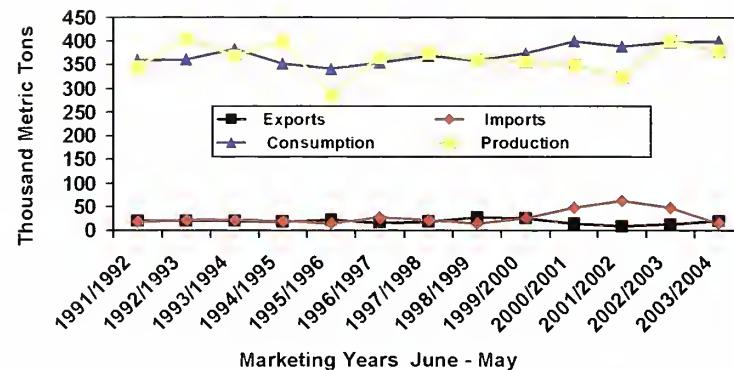
Source: U.S. Agricultural Attaché Reports and Bureau of the Census, DOC

U.S. Canned Peach Trade



Source: U.S. Agricultural Attaché Reports and Bureau of the Census, DOC

U.S. Canned Peach Market

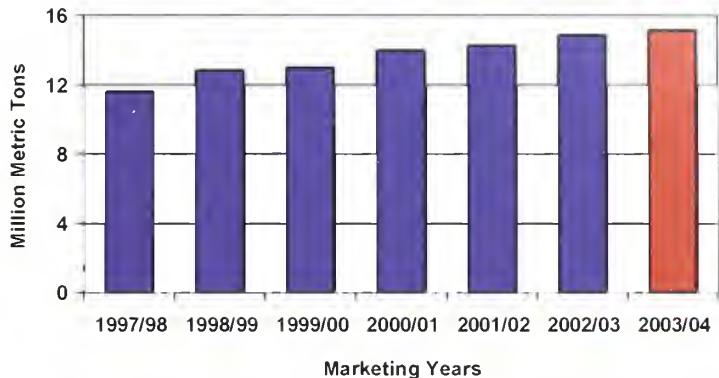


Source: Bureau of the Census, DOC

The U.S. and World Situation: Pears

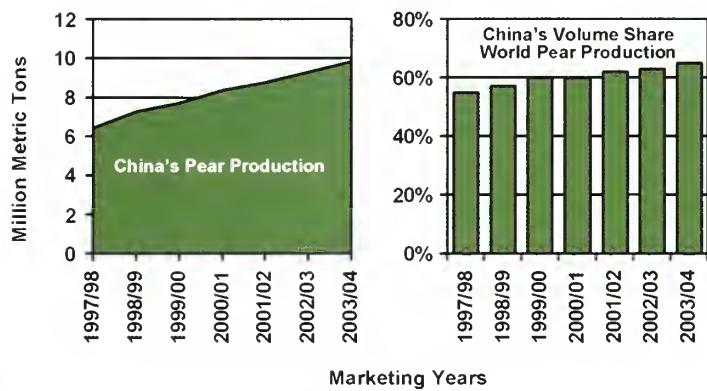
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

World Pear Production



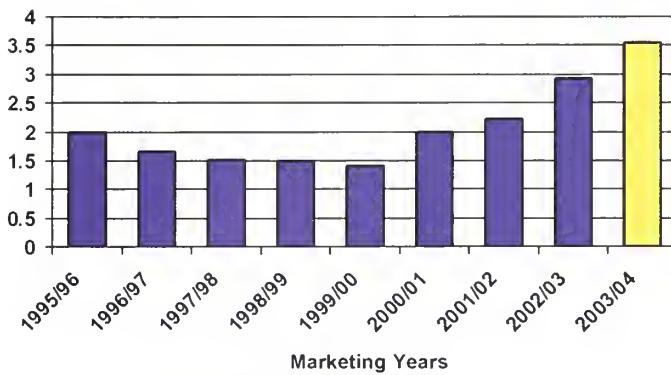
Source: FAS Agricultural Attaché reports and the U.S. National Agricultural Statistics Service, USDA
Note- World or global estimates for the purpose of this document are based on data from nearly 20 major pear-producing and trading countries. Data for MY 2003/04 is a forecast.

China's Production and Share of World Pear Crop



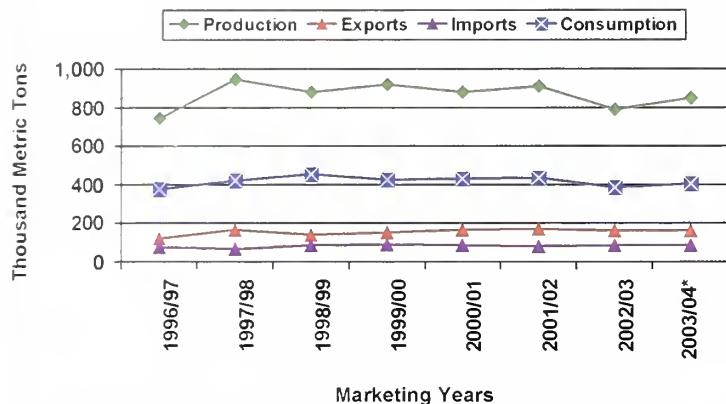
Source: U.S. Agricultural Attaché Reports, FAS/USDA
Note- Marketing year is July-June. Data for MY 2003/04 is a forecast.

Percentage of China's Pear Crop Exported Fresh



Source: U.S. Agricultural Attaché Reports, FAS/USDA
Note- Marketing year is July-June. Data for MY 2003/04 is a forecast.

The U.S. Pear Market



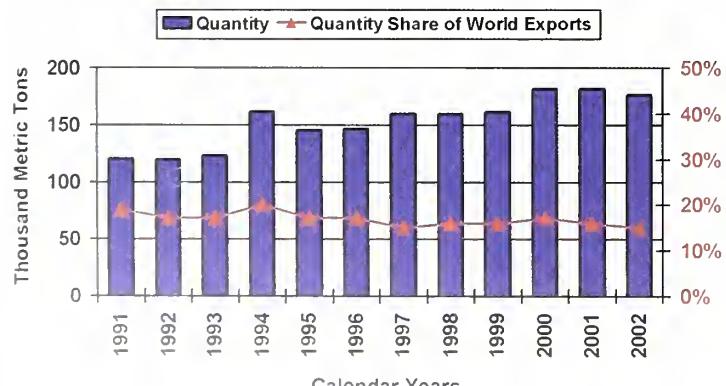
Source: National Agricultural Statistics Service, USDA
 Bureau of the Census, DOC
 Note- Marketing year is July - June. *Data for MY 2003/04 is a forecast.

U.S. Pear Exports: Value and Export Value Share



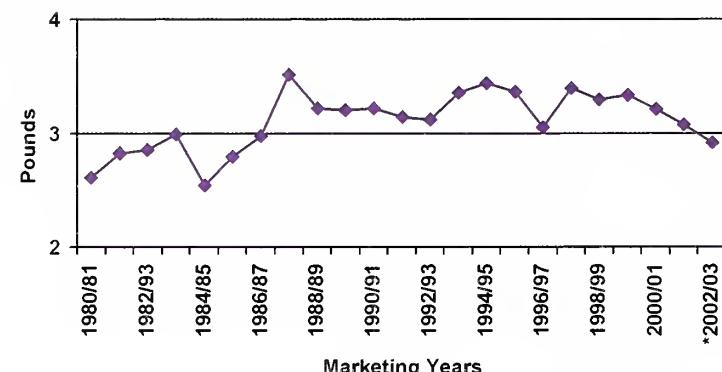
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Pear Exports: Quantity and Export Quantity Share



Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Per Capita Fresh Pear Consumption

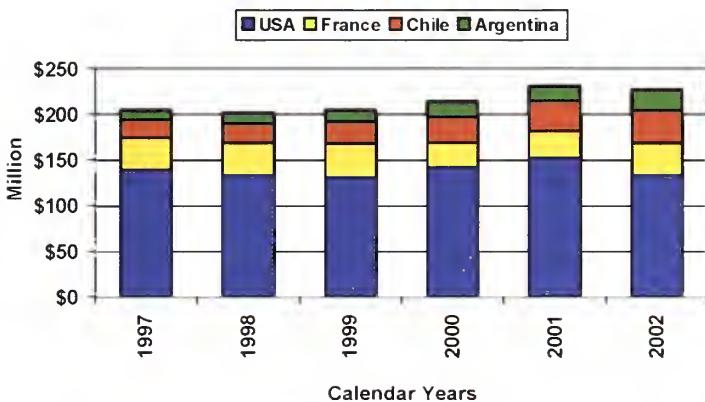


* Estimate
 Source: Economic Research Service, USDA, Marketing Year July-June

The U.S. and World Situation: Dried Plums (Prunes)

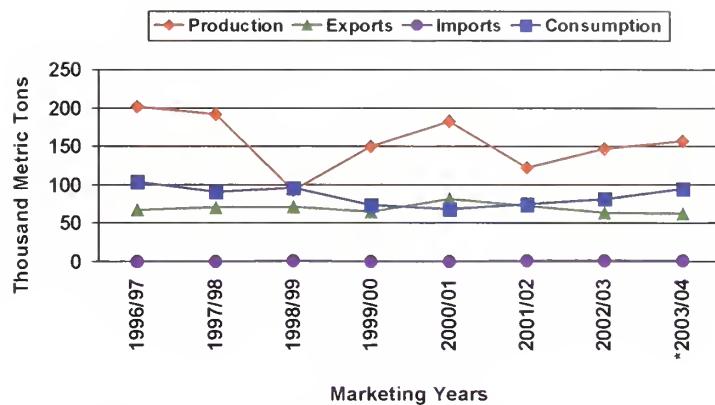
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Top Dried Plum Exporters



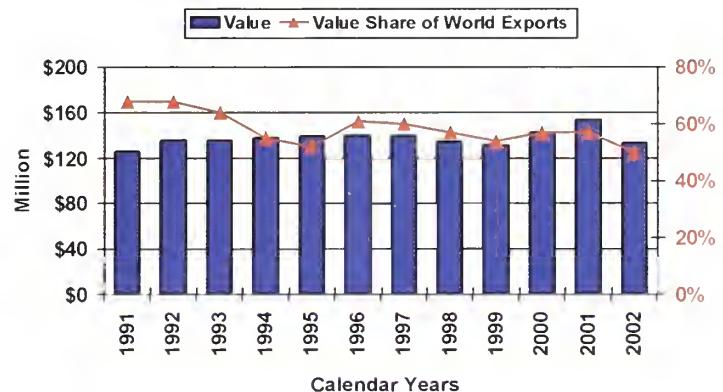
Source: Global Trade Atlas

U.S. Dried Plum Market



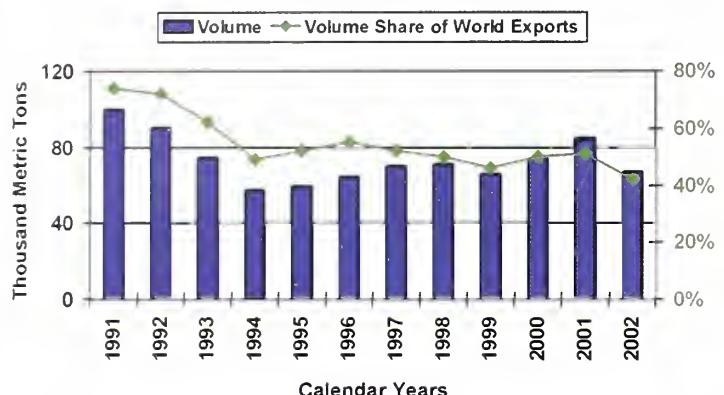
Source: Economic Research Service, National Agricultural Statistics Service, USDA
Bureau of the Census, DOC
Note—Marketing Year is August-July. * The 2003/04 year is a forecast.

U.S. Dried Plum Exports: Value and Export Value Share



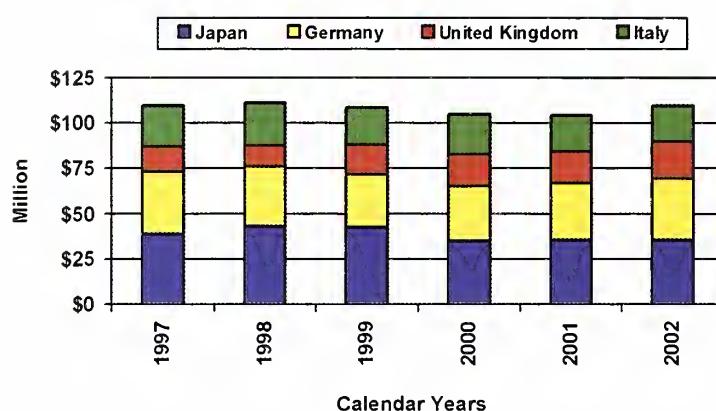
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Dried Plum Exports: Volume and Export Volume Share



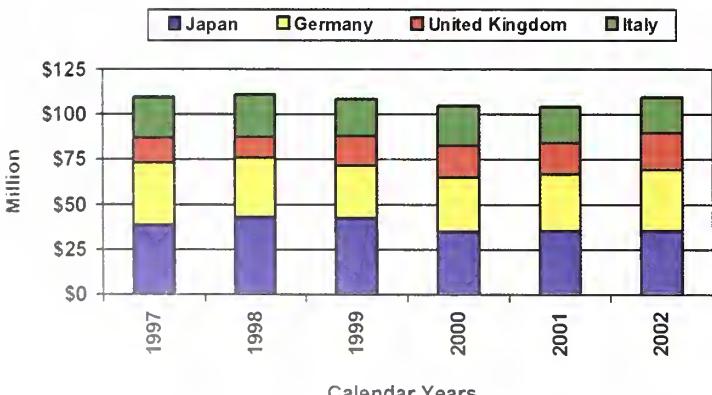
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Importers of Dried Plums



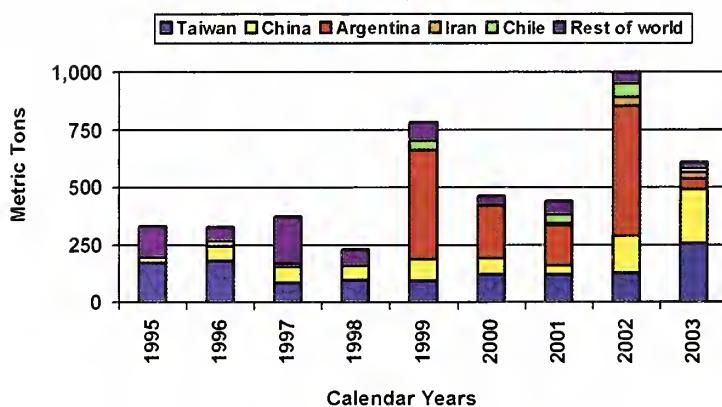
Source: Global Trade Atlas

Top Importers of Dried Plums



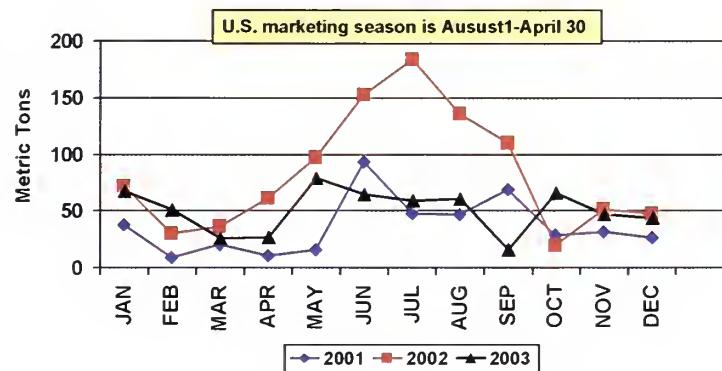
Source: Global Trade Atlas

U.S. Imports of Dried Plums from Top Suppliers



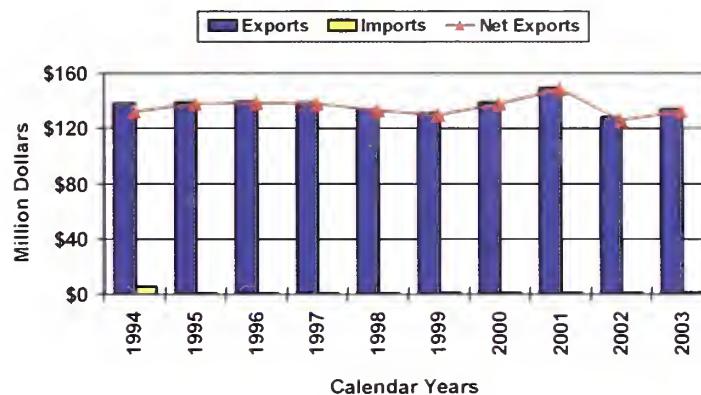
Source: Bureau of the Census, DOC

U.S. Monthly Imports of Dried Plums



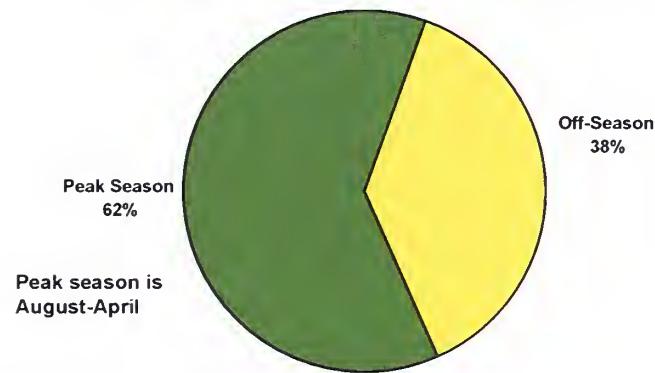
Source: Bureau of the Census, DOC

U.S. Value Trade in Dried Plums



Source: Bureau of the Census, DOC

Share of Dried Plum Imports in Relation to the U.S. Marketing Season

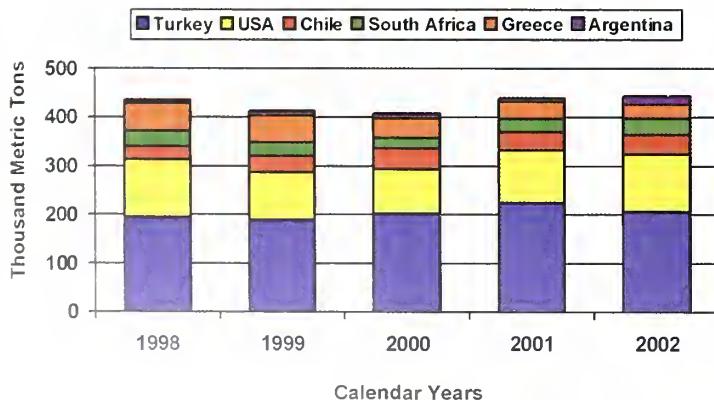


Source: Bureau of the Census, DOC

The U.S. and World Situation: Raisins

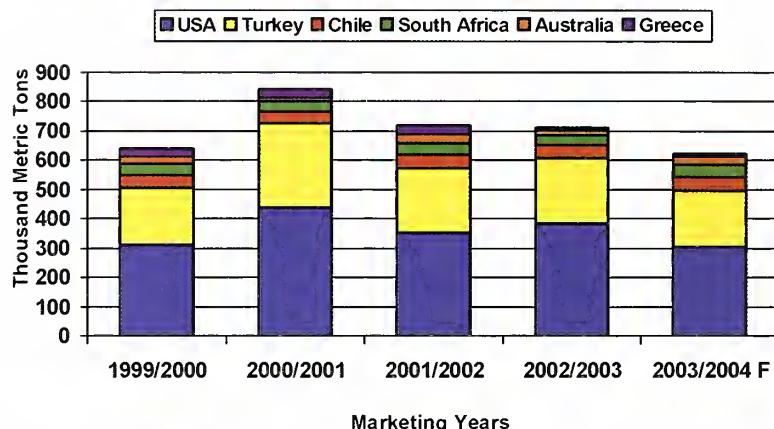
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Top Raisin Exporters



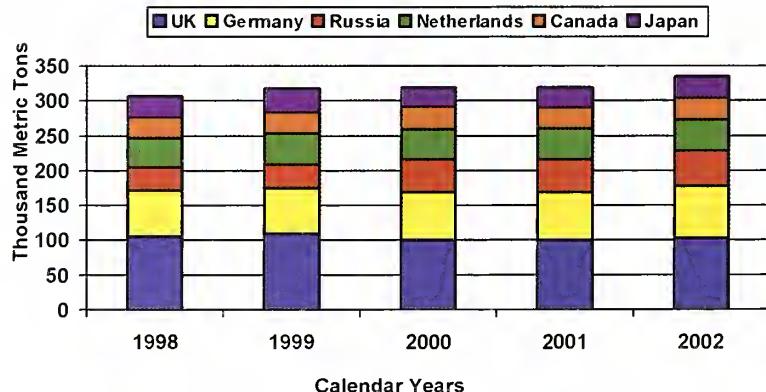
Source: Global Trade Atlas

Major Raisin Producers



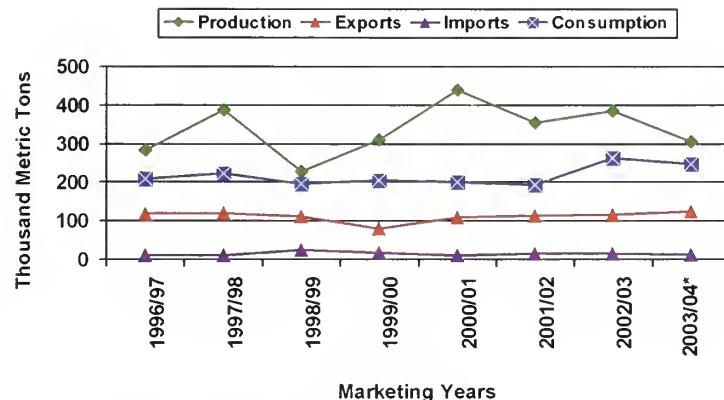
Source: U.S. Agricultural Attaché Reports

Top Raisin Importers



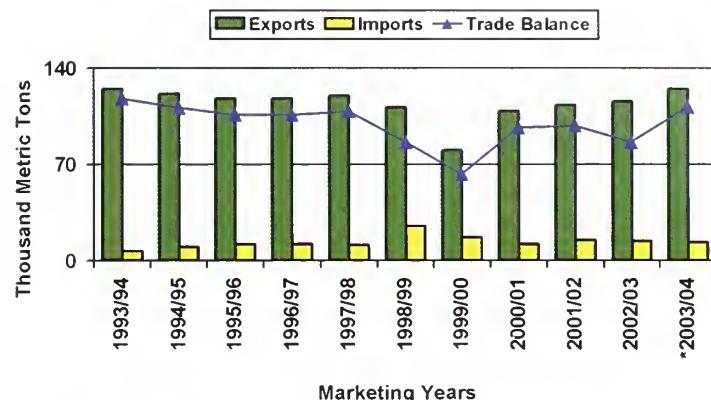
Source: Global Trade Atlas

The U.S. Raisin Market



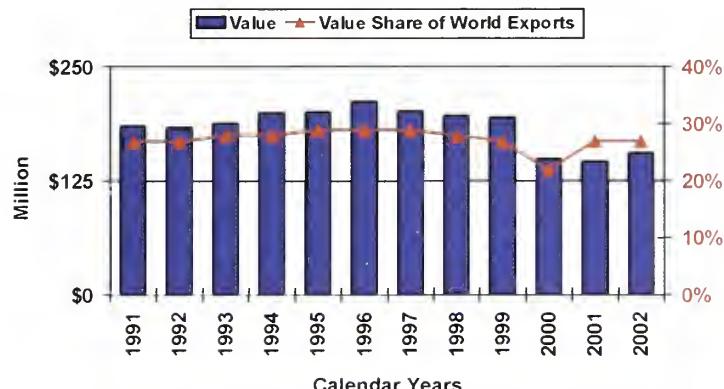
Source: National Agricultural Statistics Service, USDA
 Bureau of the Census, DOC
 Note- Marketing year is August-July. *Data for MY 2003/04 is a forecast.

U.S. Volume Trade in Raisins



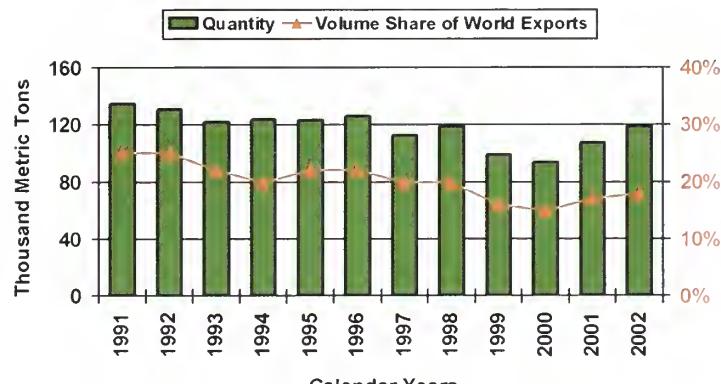
Source: Bureau of the Census, DOC
 Note-Marketing year is August-July. *Data for MY 2003/04 is a forecast.

U.S. Raisin Exports: Value and Export Value Share



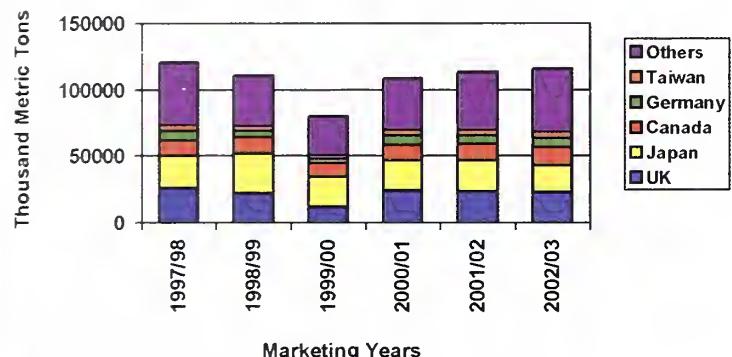
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Raisin Exports: Volume and Export Volume Share



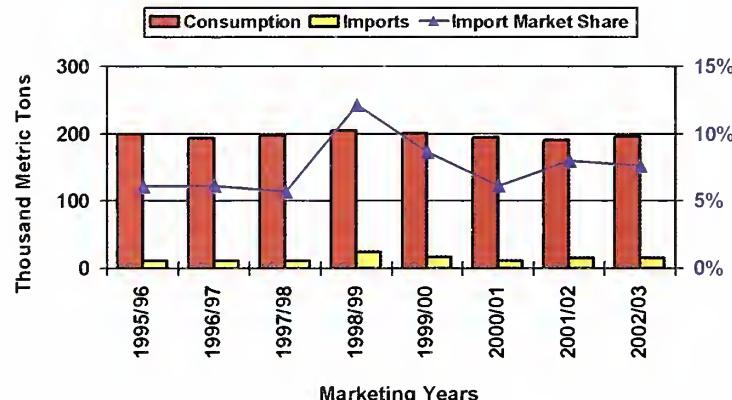
Source: Food and Agriculture Organization (FAO) of the United Nations

Destination of U.S. Raisin Exports



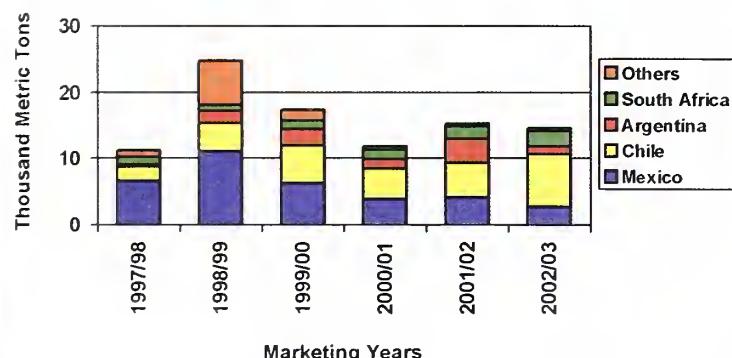
Source: Bureau of the Census, DOC

U.S. Raisin Imports and Share of Domestic Consumption



Source: Economic Research Service, USDA and Bureau of the Census, DOC

Origin of U.S. Raisin Imports



Source: Bureau of the Census, DOC

U.S. Monthly Imports of Raisins

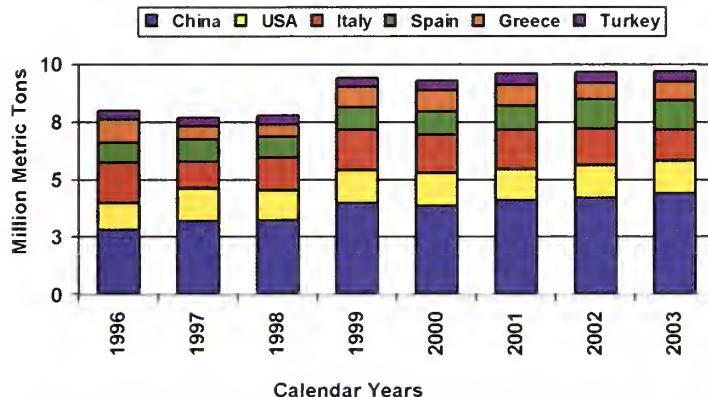


Source: Bureau of the Census, DOC

The U.S. and World Situation: Stone Fruits

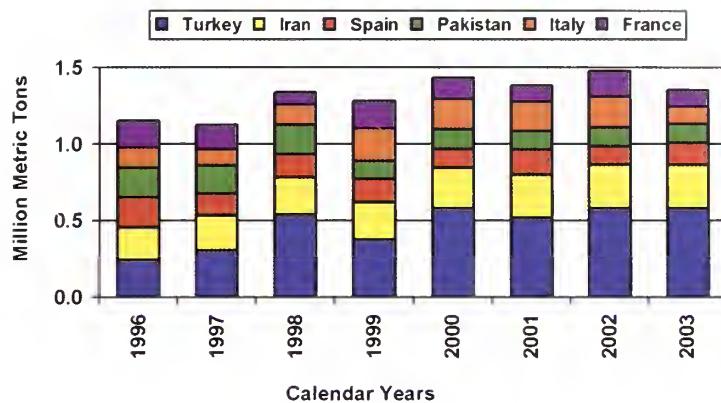
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Top Peach and Nectarine Producers



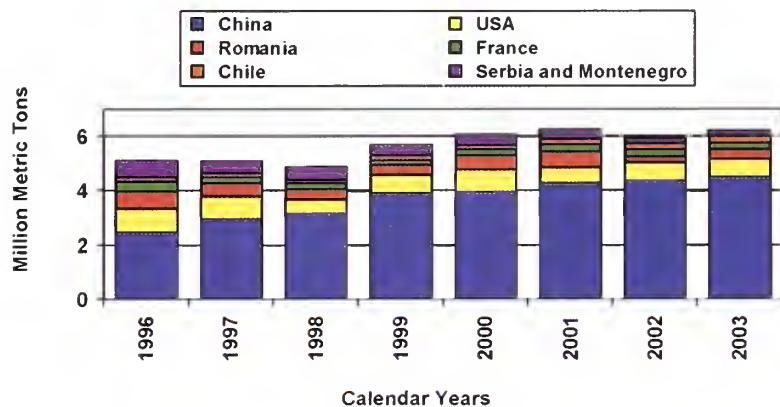
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Apricot Producers



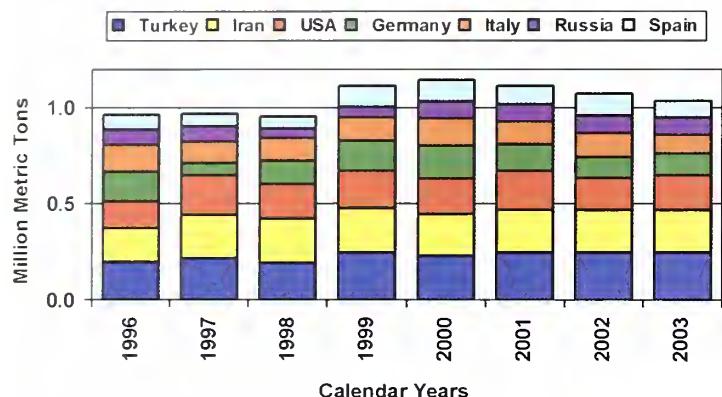
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Plum Producers



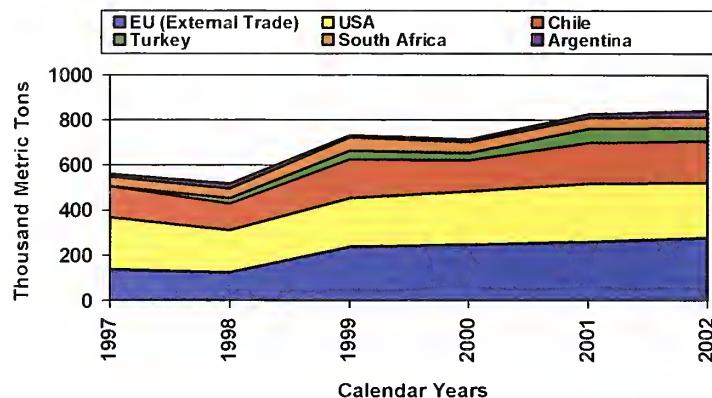
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Cherry Producers



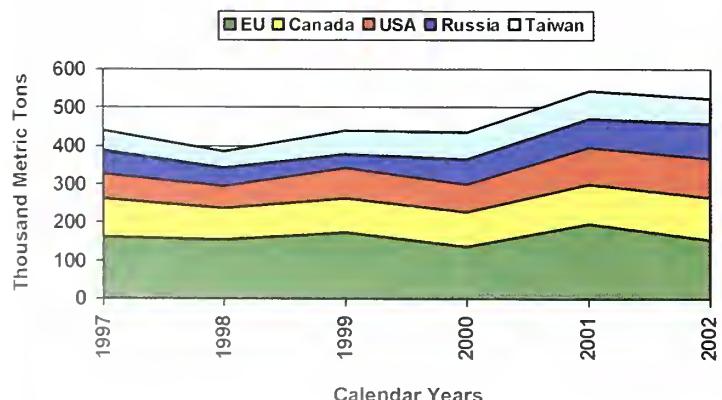
Source: Food and Agriculture Organization (FAO) of the United Nations

Major Exporters of Stone Fruits



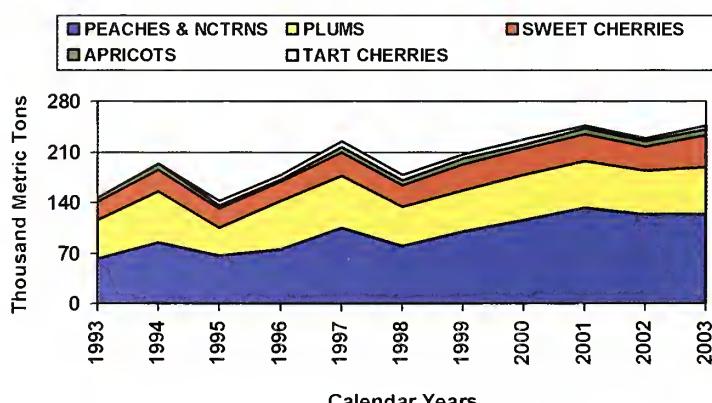
Source: Global Trade Atlas

Major Stone Fruit Importers



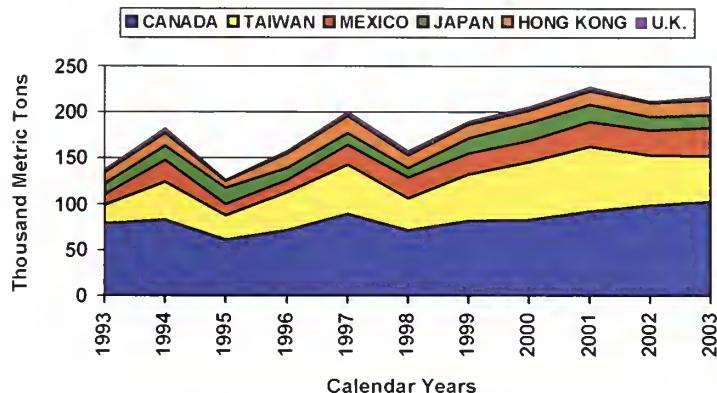
Source: Global Trade Atlas

U.S. Stone Fruit Exports by Type



Source: U.S. Department of Commerce, Bureau of the Census

Top Export Markets for U.S. Stone Fruits



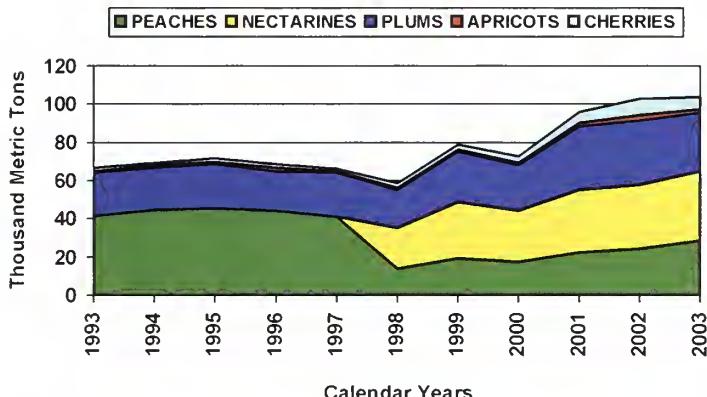
Source: U.S. Department of Commerce, Bureau of the Census

Global Stone Fruit Export Value and U.S. Share of World Trade



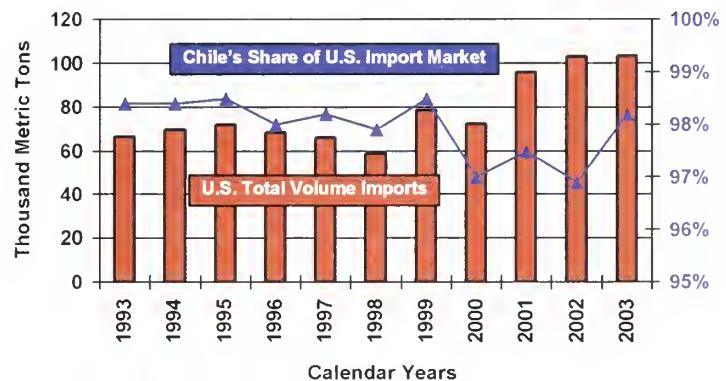
Source: Food and Agriculture Organization (FAO) of the United Nations
Note- Excludes EU Intra Trade.

U.S. Stone Fruit Imports by Type



Source: Bureau of the Census, DOC

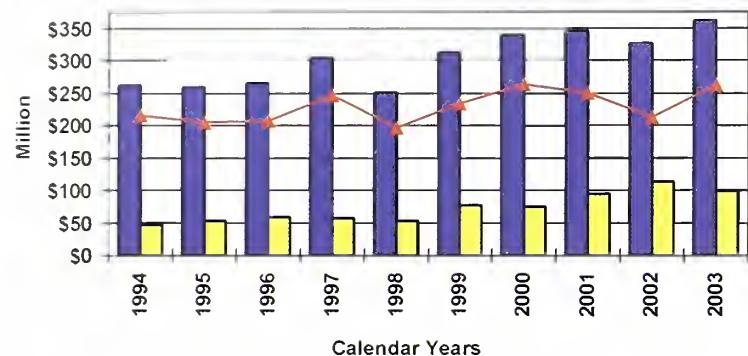
Chile's Share of the U.S. Stone Fruit Import Market



Source: U.S. Department of Commerce, Bureau of the Census

U.S. Value Trade in Stone Fruit

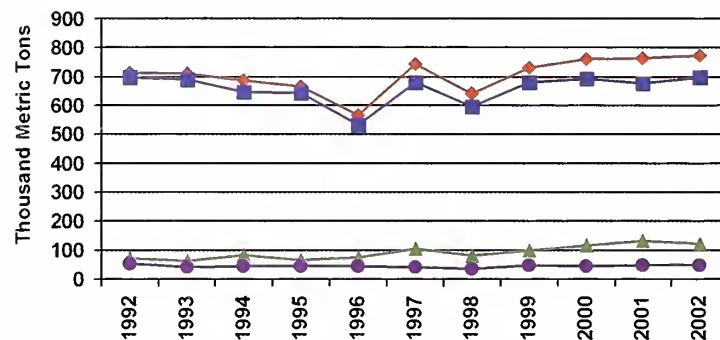
Exports Imports Net Exports



Source: Bureau of the Census, DOC

U.S. Fresh Peach and Nectarine Market

Production Exports Imports Consumption

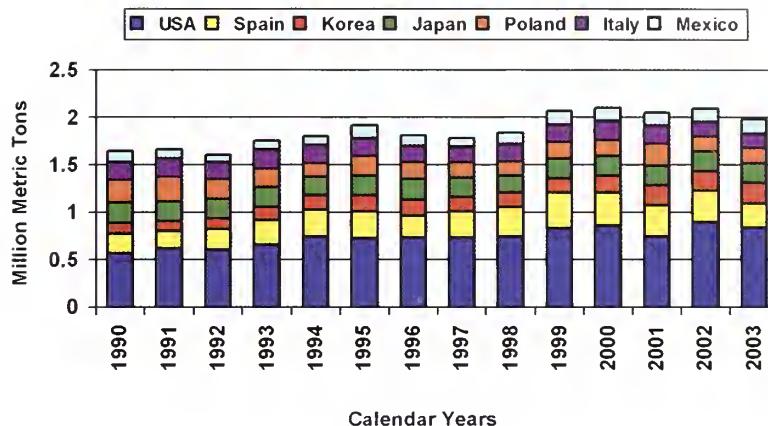


Source: Economic Research Service, National Agricultural Statistics Service, USDA
Bureau of the Census, DOC

The U.S. and World Situation: Strawberries

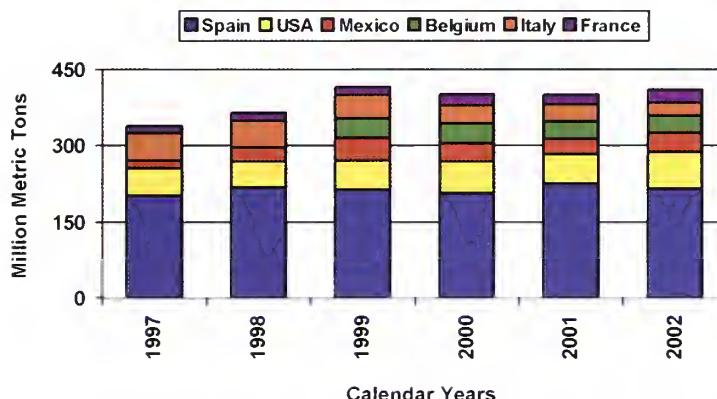
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Major Strawberry Producers



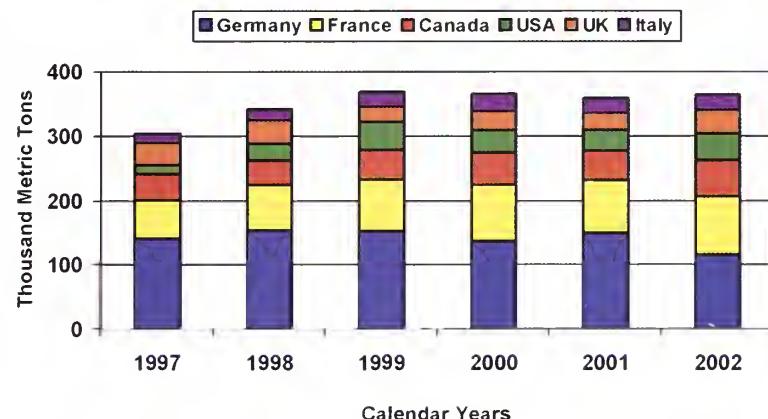
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Fresh Strawberry Exporters



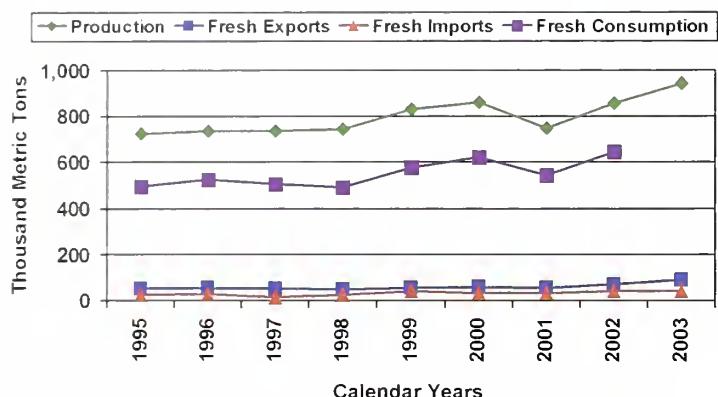
Source: Global Trade Atlas

Top Fresh Strawberry Importers



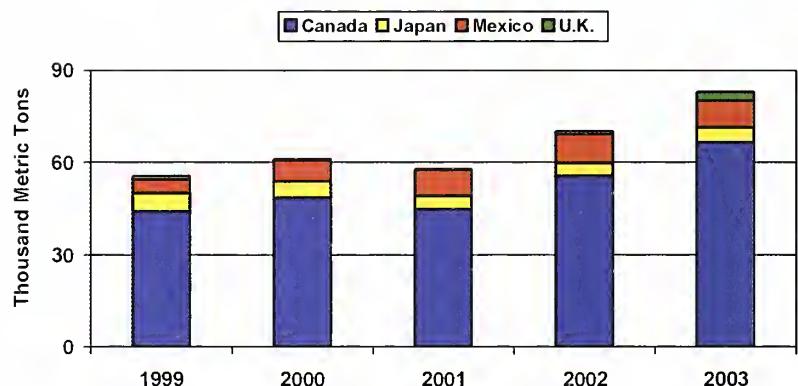
Source: Global Trade Atlas

The U.S. Fresh Strawberry Market



Source: Economic Research Service, National Agricultural Statistics Service, USDA
Bureau of the Census, DOC

Top U.S. Fresh Strawberry Export Markets



Source: Bureau of the Census, DOC

U.S. Fresh Strawberry Exports: Value and Export Value Share



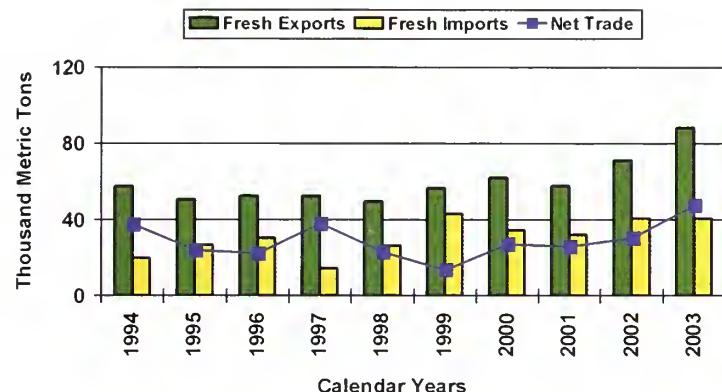
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Fresh Strawberry Exports: Volume and Export Volume Share



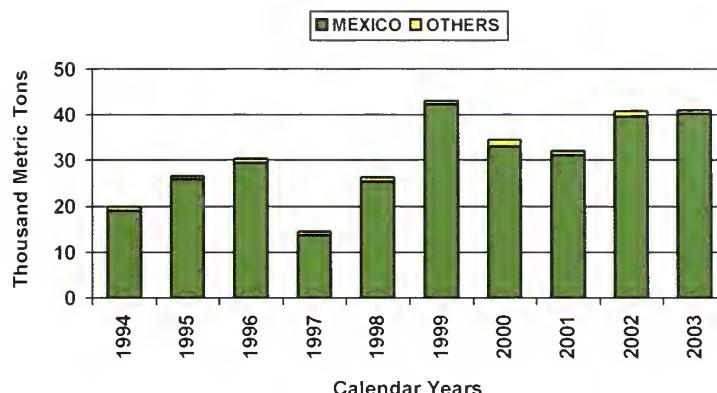
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Volume Trade in Fresh Strawberries



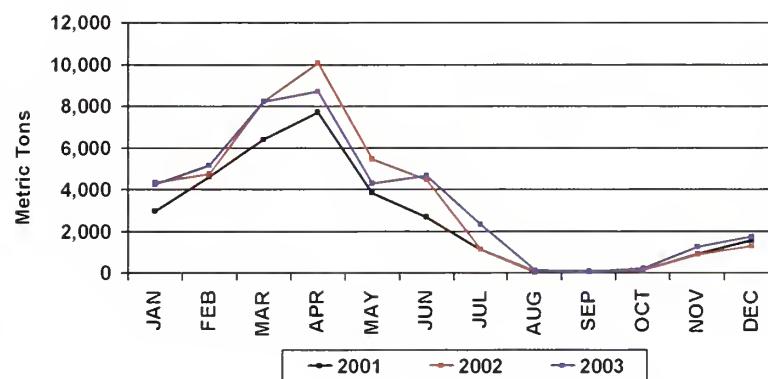
Source: Bureau of the Census, DOC

U.S. Fresh Strawberry Imports



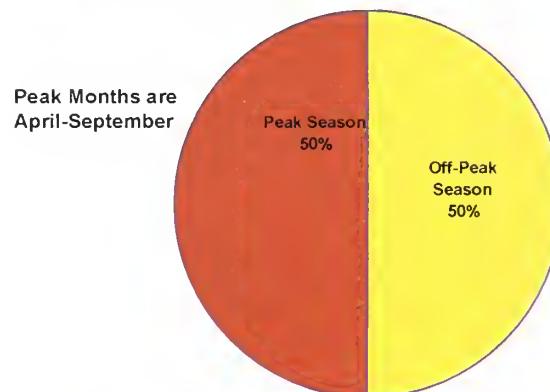
Source: Bureau of the Census, DOC

U.S. Monthly Strawberry Imports



Source: Bureau of the Census, DOC

Average Share of Strawberry Imports in Relation to the U.S. Marketing Season (2000-2003)

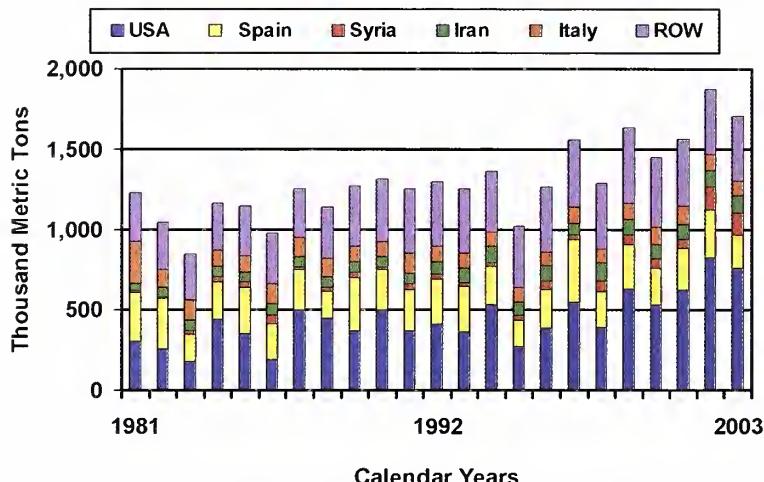


Source: Bureau of the Census, DOC

The U.S. and World Situation: Almonds

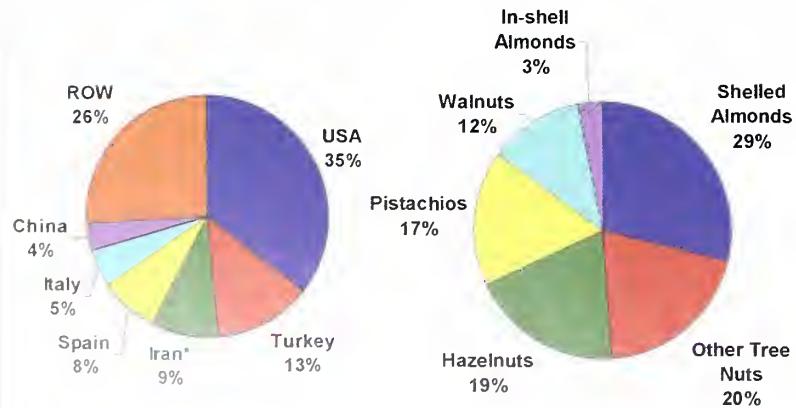
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Global Almond Production



Source: Food and Agriculture Organization (FAO) of the United Nations

CY 2002 Tree Nut Exports Totaled \$3.2 Billion

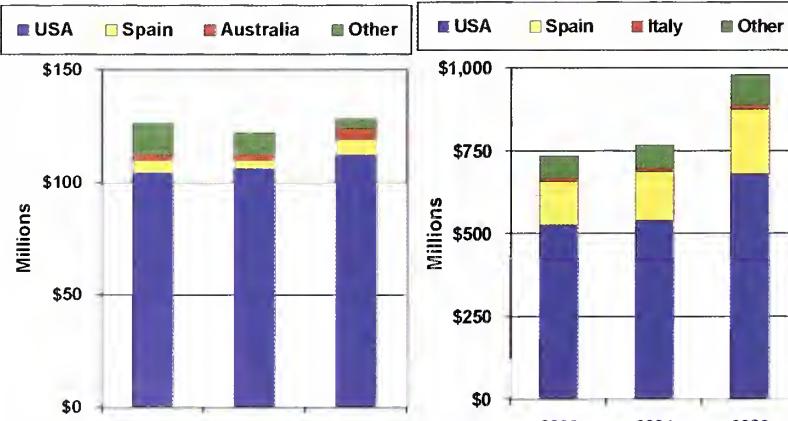


Source: Global Trade Atlas

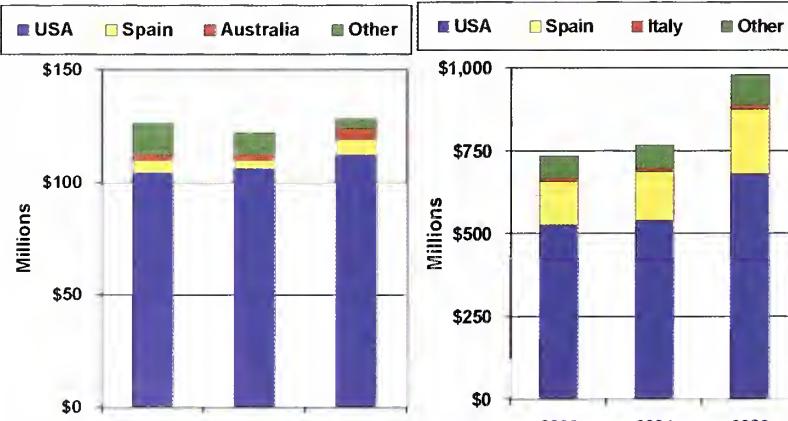
* Derived from reported imports

Top Exporters of Almonds

In-shell Almonds



Shelled Almonds



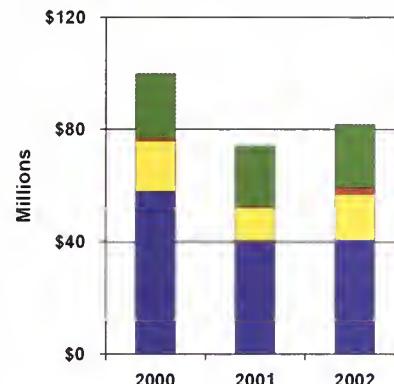
Source: Global Trade Atlas

Calendar Years

Top Importers of Almonds

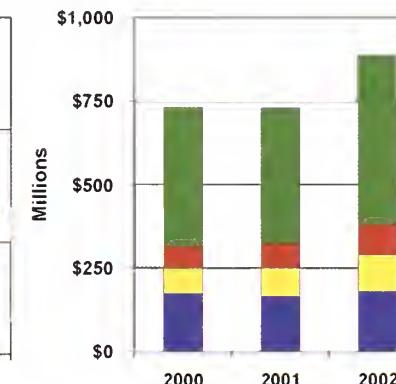
In-shell Almonds

■ India ■ Hong Kong ■ Italy ■ Other



Shelled Almonds

■ Germany ■ Spain ■ Japan ■ Other



Source: Global Trade Atlas

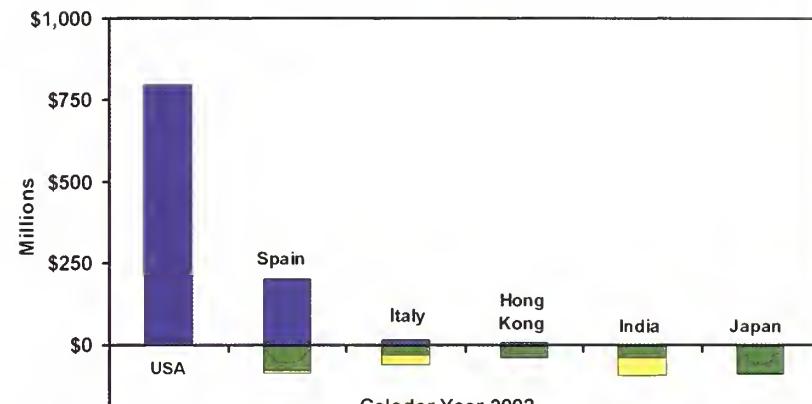
Calendar Years

Key Almond Traders

Exports

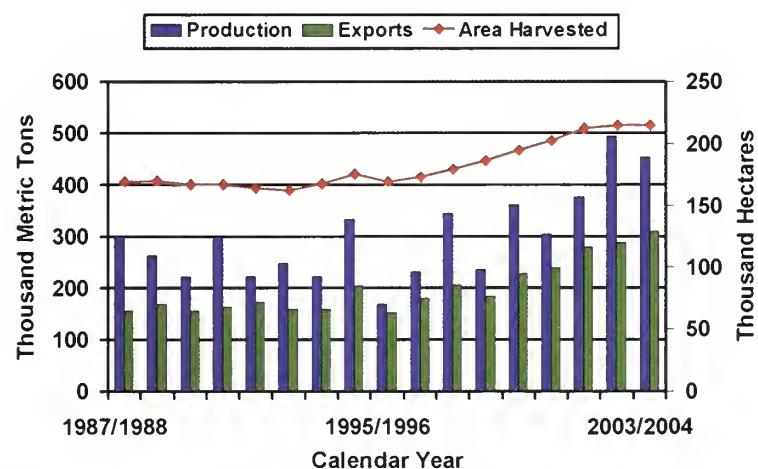
Imports from USA

Imports from Other Countries



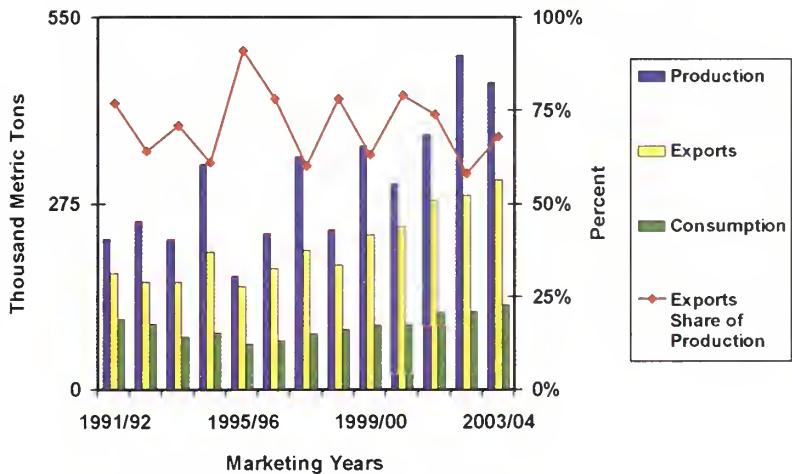
Source: Global Trade Atlas. Includes shelled and in-shell almonds.

U.S. Almond Plantings and Production



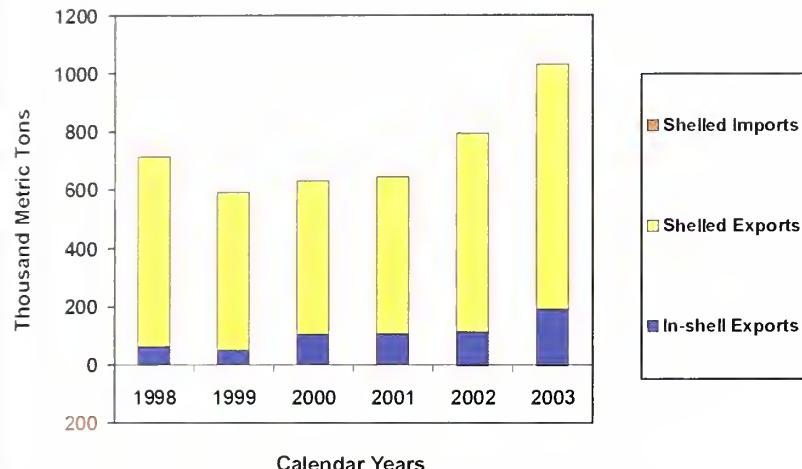
Source: National Agricultural Statistics Service, USDA; Economic Research Service, USDA

U.S. Almond Production, Consumption, and Exports



Source: Economic Research Service, USDA. Imports are negligible.

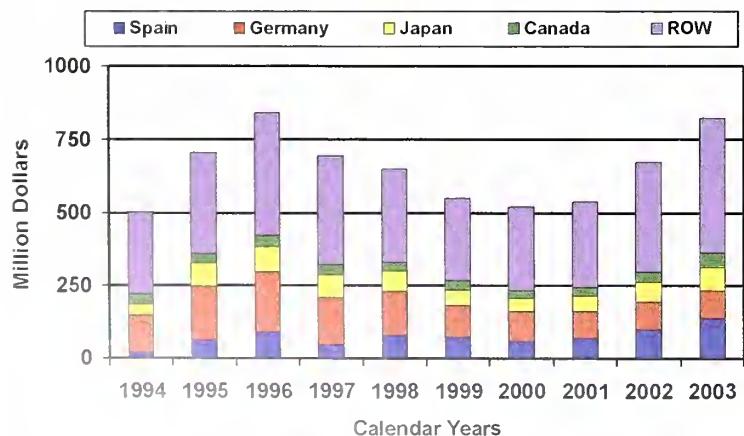
U.S. Almond Trade Balance



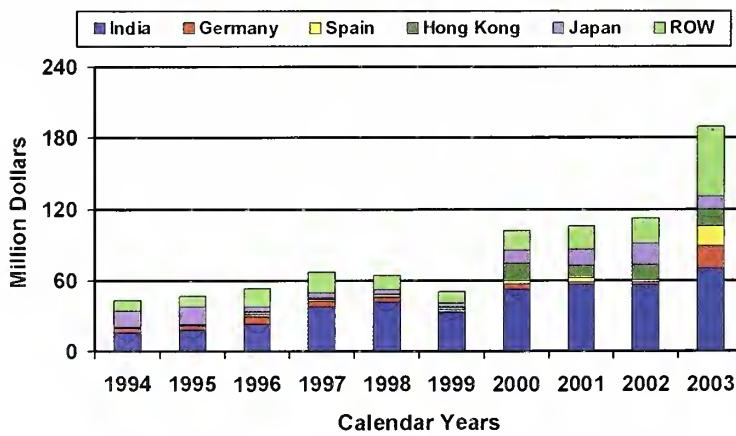
U.S. Almond Exports and Global Market Share



Top U.S. Shelled Almond Export Markets



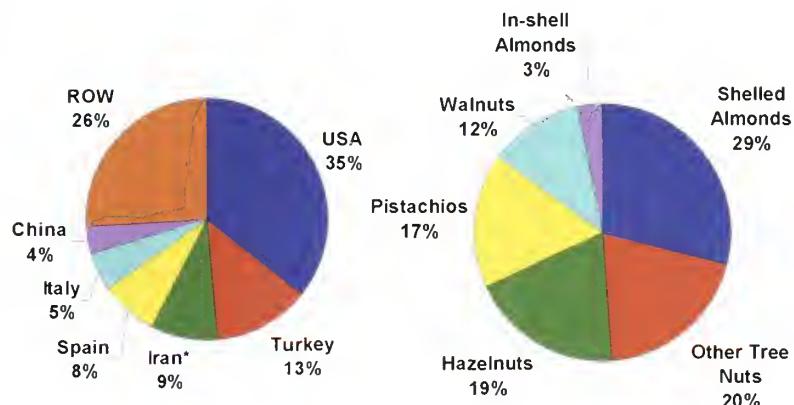
Top U.S. In-shell Almond Export Markets



The U.S. and World Situation: Walnuts

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

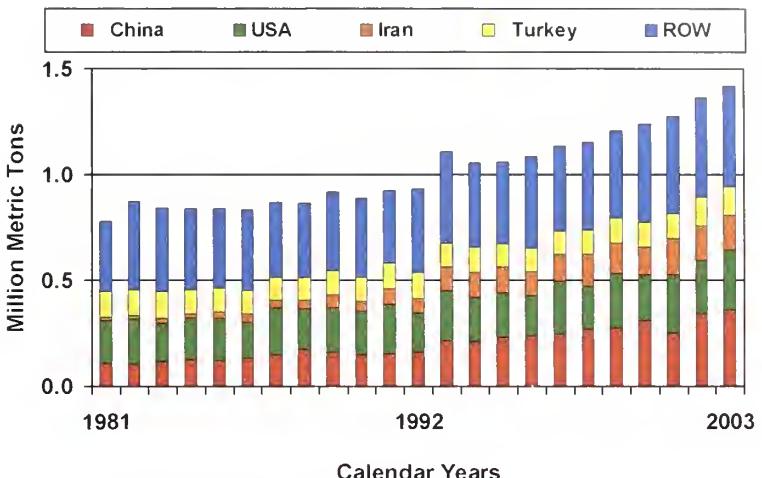
CY 2002 Global Tree Nut Exports Totaled \$3.2 Billion



Source: Global Trade Atlas

* Derived from reported imports

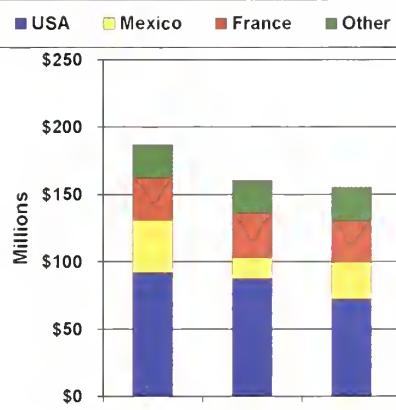
Global Walnut Production



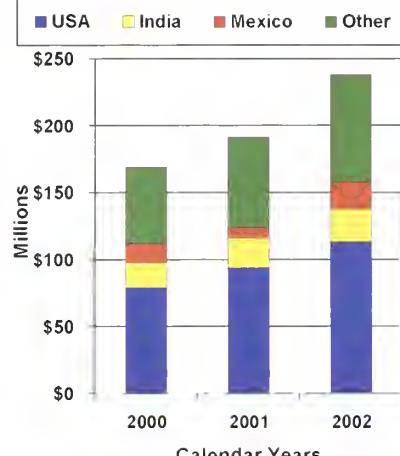
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Exporters of Walnuts

In-shell Walnuts



Shelled Walnuts

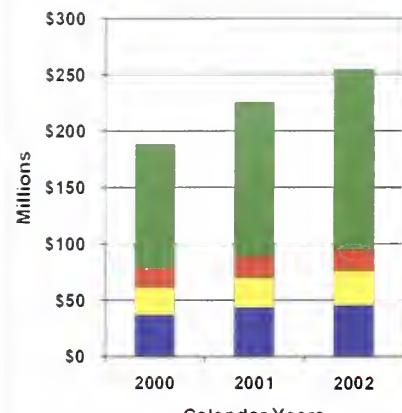


Source: Global Trade Atlas

Top Importers of Walnuts

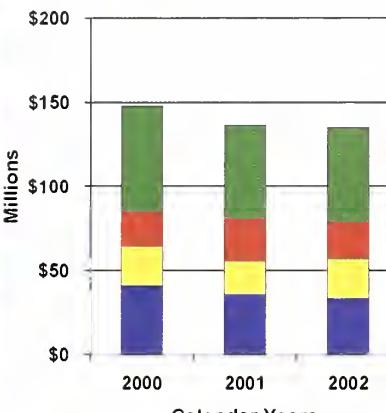
In-shell Walnuts

■ Japan ■ Germany ■ France ■ Other



Shelled Walnuts

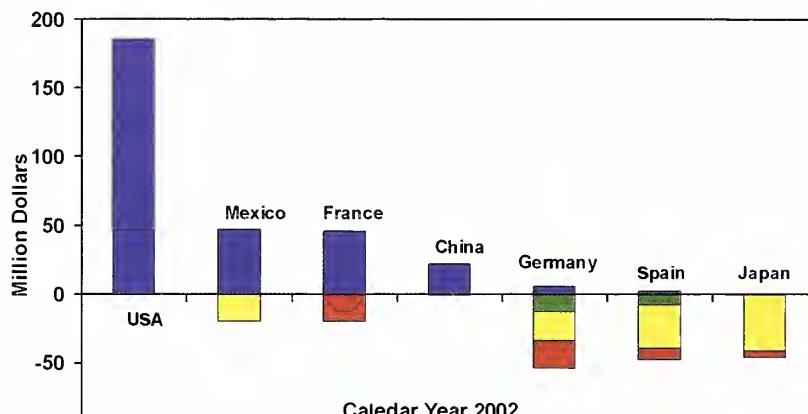
■ Spain ■ Germany ■ Italy ■ Other



Source: Global Trade Atlas

Key Walnuts Traders

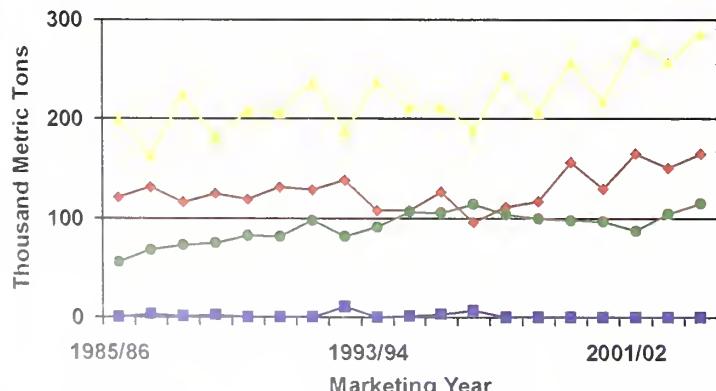
■ Exports ■ Imports from France ■ Imports from U.S.A. ■ Imports from Other Countries



Source: Global Trade Atlas. Includes shelled and in-shell walnuts.

U.S. Walnut Production, Consumption and Trade: In-shell Basis

■ Production ■ Imports ■ Domestic Consumption ■ Exports

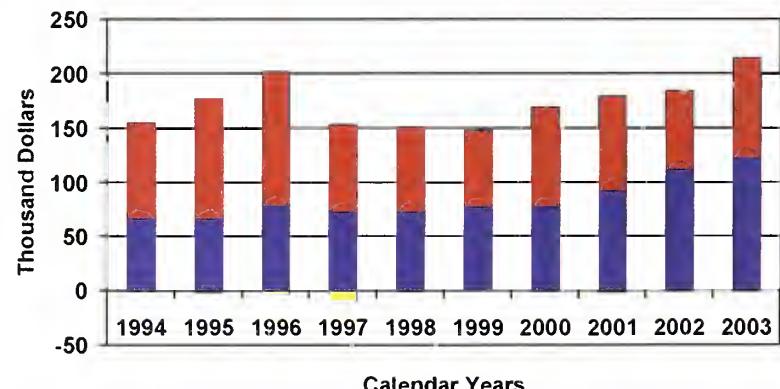


Source: National Agricultural Statistics Service, USDA; Economic Research Service, USDA

U.S. Walnut Trade Balance

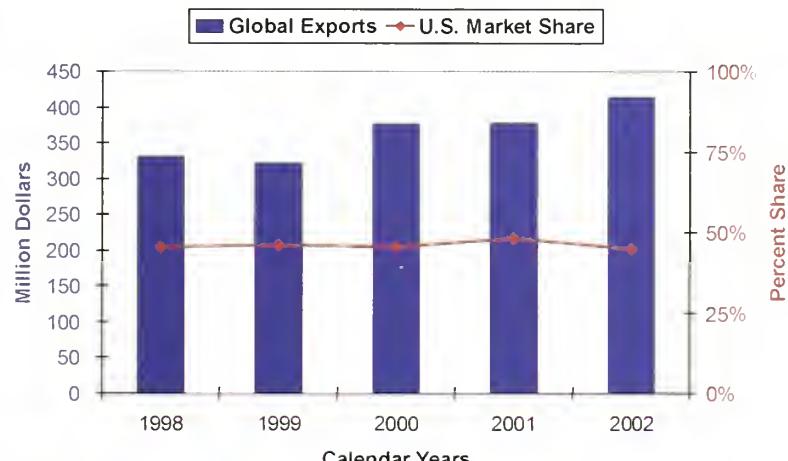
■ Shelled Exports ■ In-shell Exports

■ Shelled Imports ■ In-shell Imports



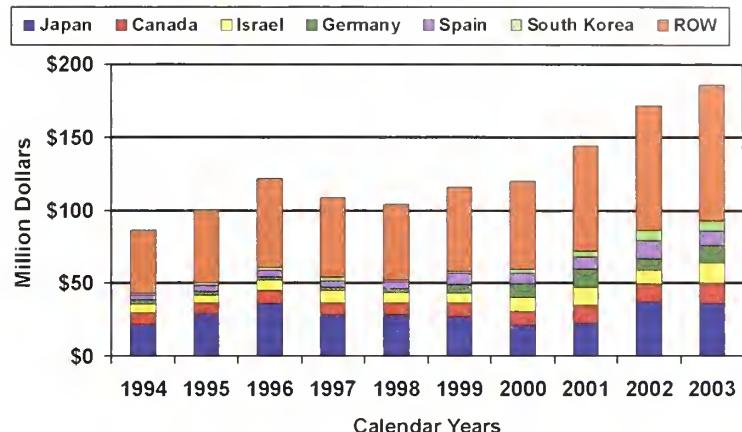
Source: Bureau of the Census, DOC Note: In-shell Imports are negligible.

U.S. Share of Global Walnut Exports



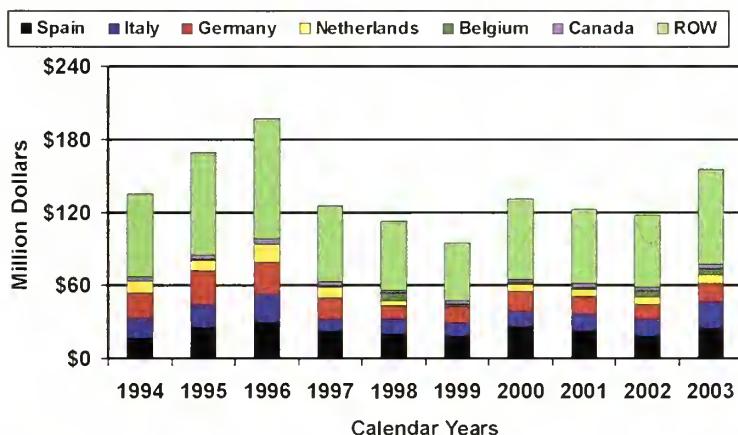
Source: Global Trade Atlas

Top U.S. Shelled Walnut Export Markets



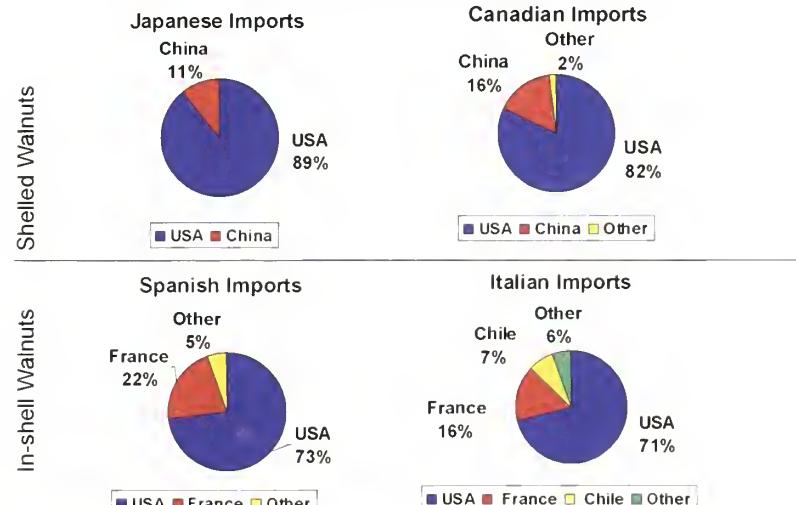
Source: Bureau of the Census, DOC

Top U.S. In-shell Walnuts Export Markets



Source: Bureau of the Census, DOC

Competition in Key Markets

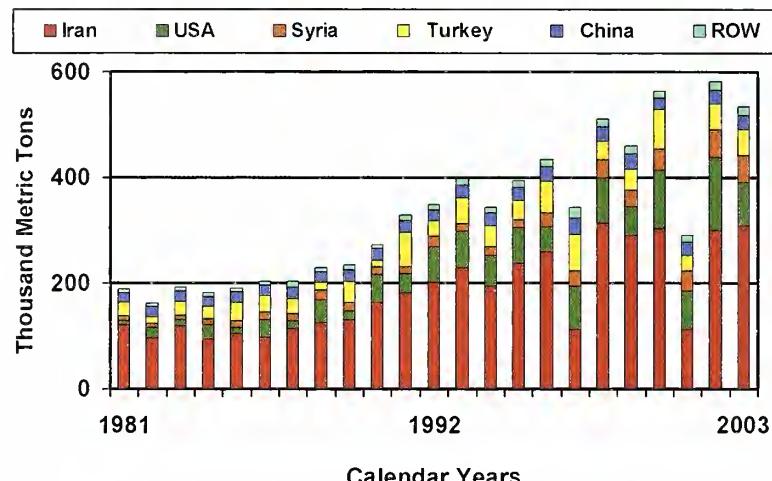


Source: Global Trade Atlas

The U.S. and World Situation: Pistachios

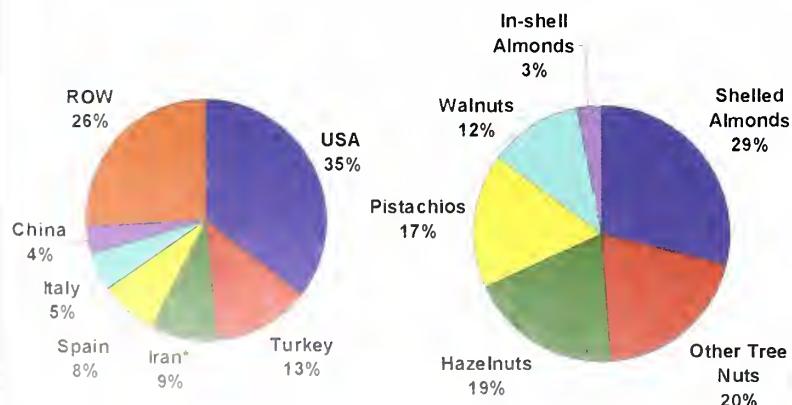
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Global Pistachio Production



Source: Food and Agriculture Organization (FAO) of the United Nations

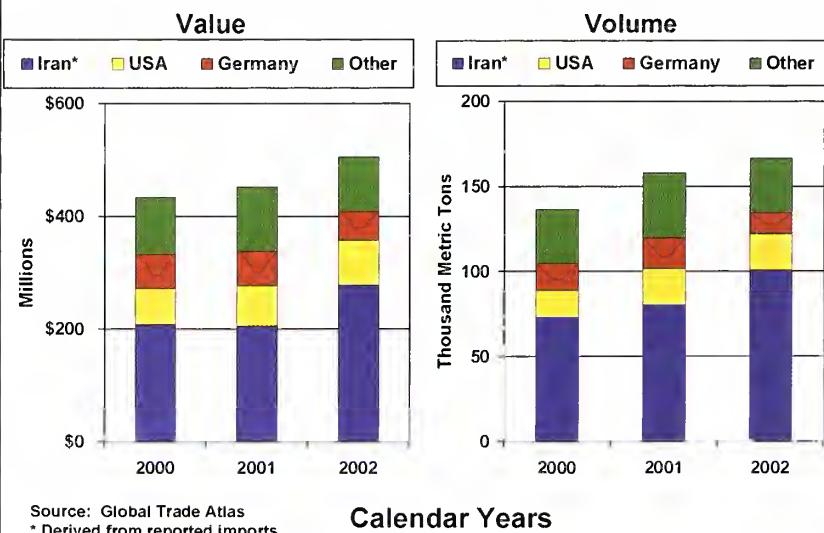
CY 2002 Global Tree Nut Exports Totaled \$3.2 Billion



Source: Global Trade Atlas

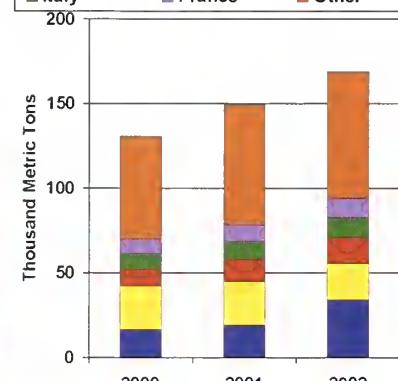
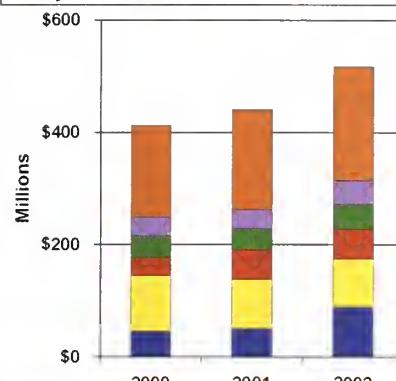
* Derived from reported imports

Top Exporters of Pistachios



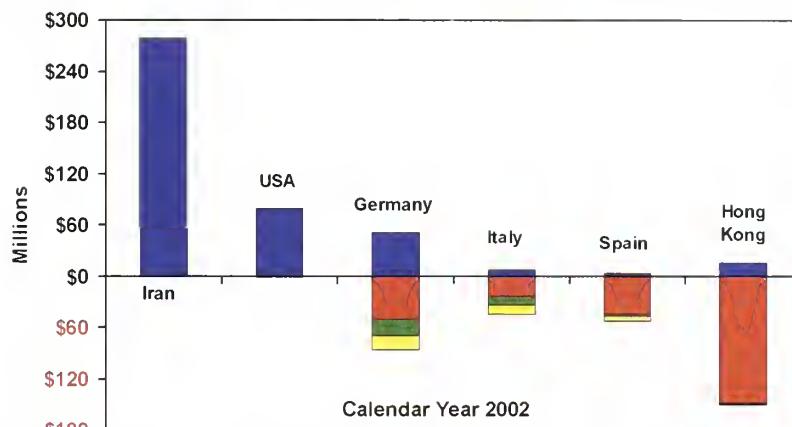
Source: Global Trade Atlas
* Derived from reported imports

Top Importers of Pistachios

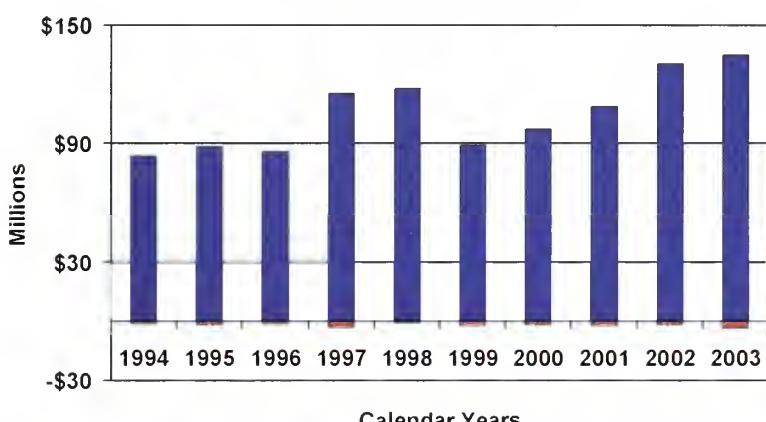


Calendar Years

Key Pistachio Traders

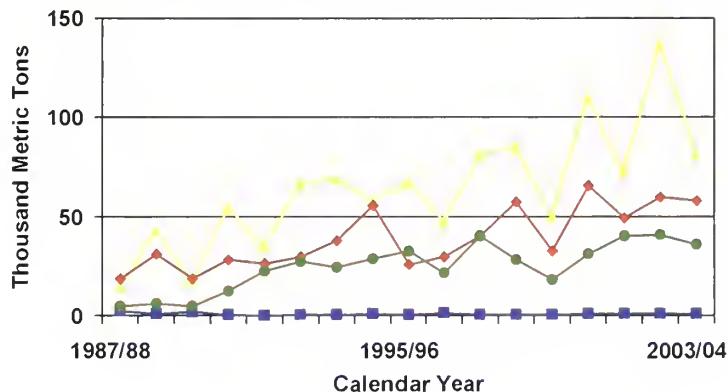


U.S. Pistachio Trade Balance



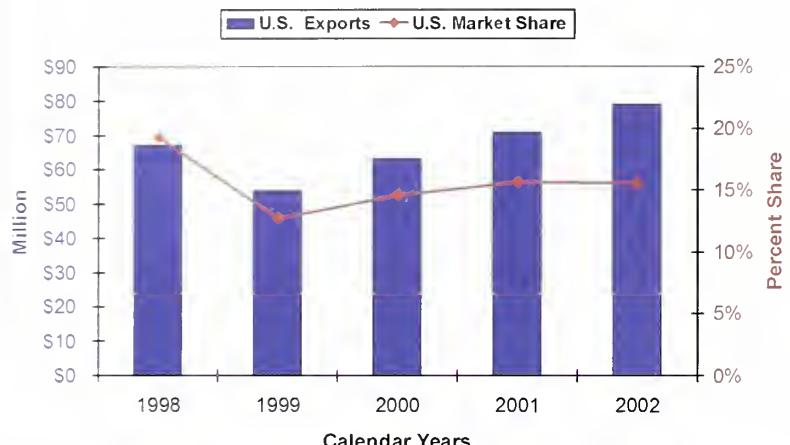
Source: Bureau of the Census, DOC. Data includes in-shelled, shelled and processed pistachios.

U.S. Pistachio Production, Consumption and Trade: In-shell Basis



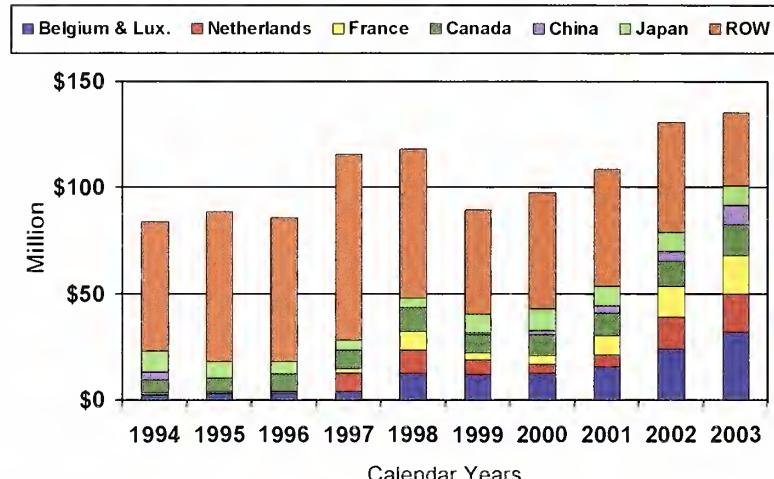
Source: National Agricultural Statistics Service, USDA; Economic Research Service, USDA

U.S. Pistachio Exports and Global Market Share



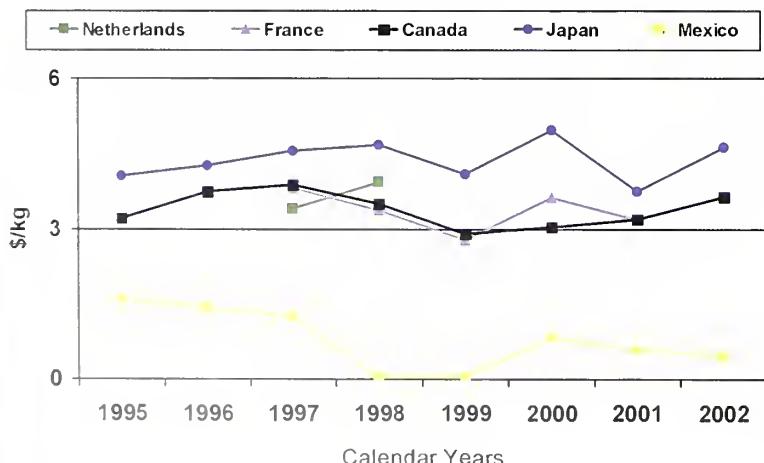
Source: Global Trade Atlas. Includes only shelled and in-shell pistachios.

Top U.S. Pistachio Export Markets



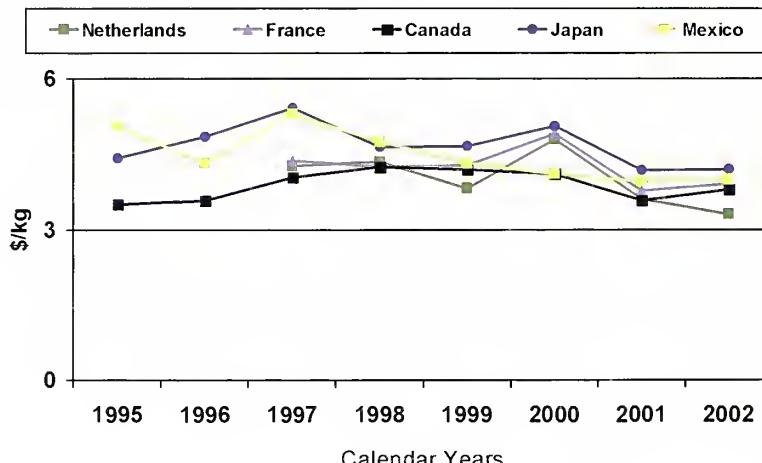
Source: Bureau of the Census, DOC. Data includes shelled, in-shell and processed pistachios.

Derived Unit Price of Iranian Pistachios in Key Markets



Source: Global Trade Atlas

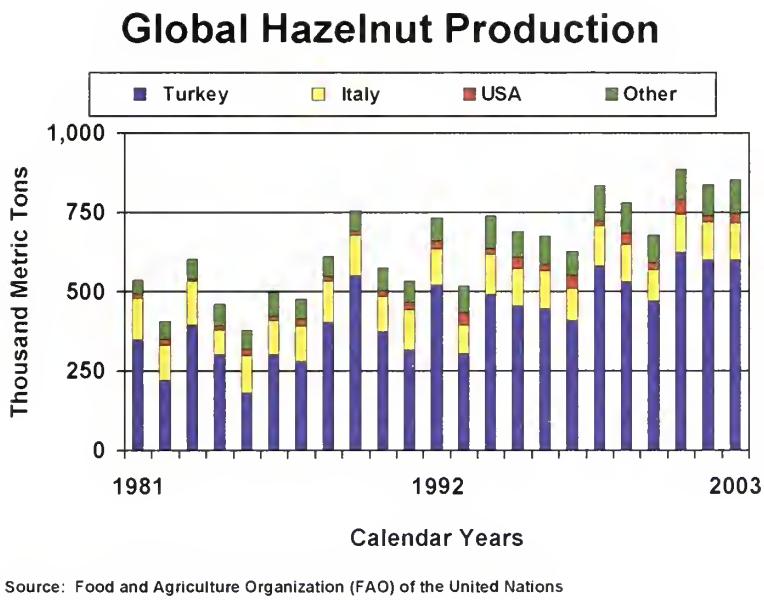
Derived Unit Price of U.S. Pistachios in Key Markets



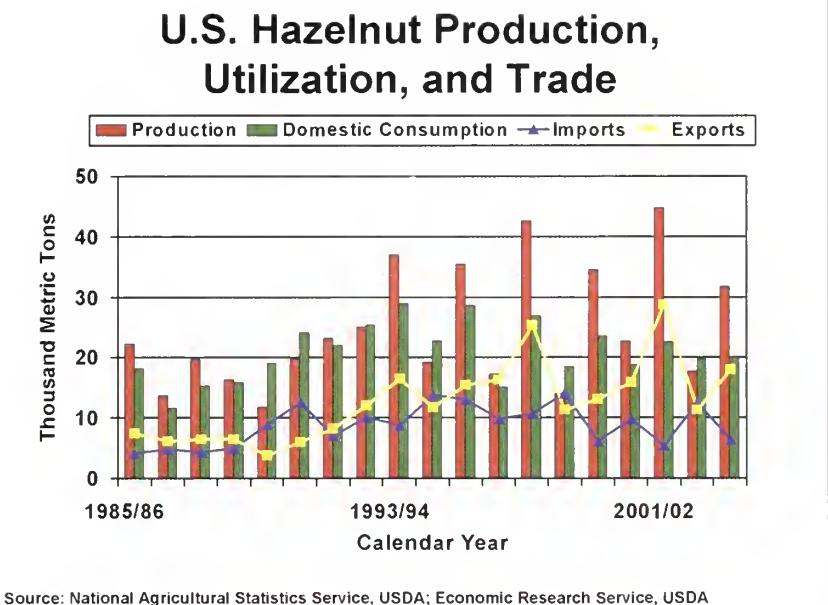
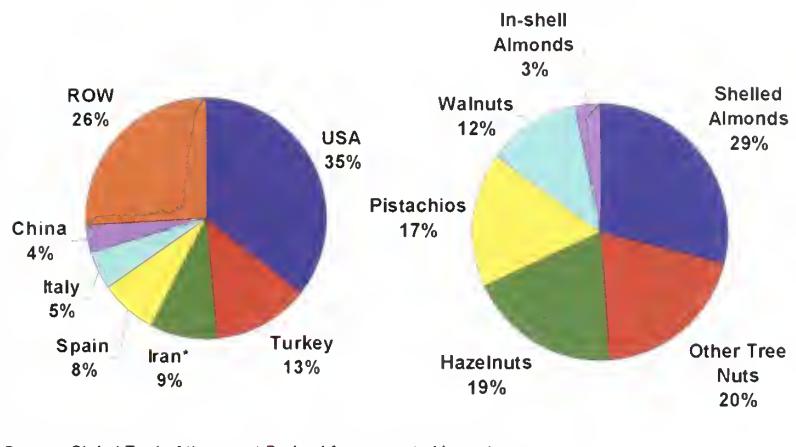
Source: Global Trade Atlas

The U.S. and World Situation: Hazelnuts and Macadamia Nuts

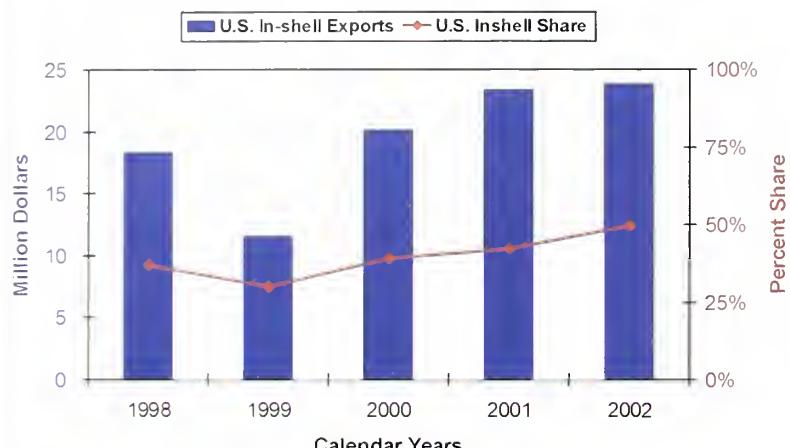
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004



CY 2002 Global Tree Nut Exports Totalled \$3.2 Billion

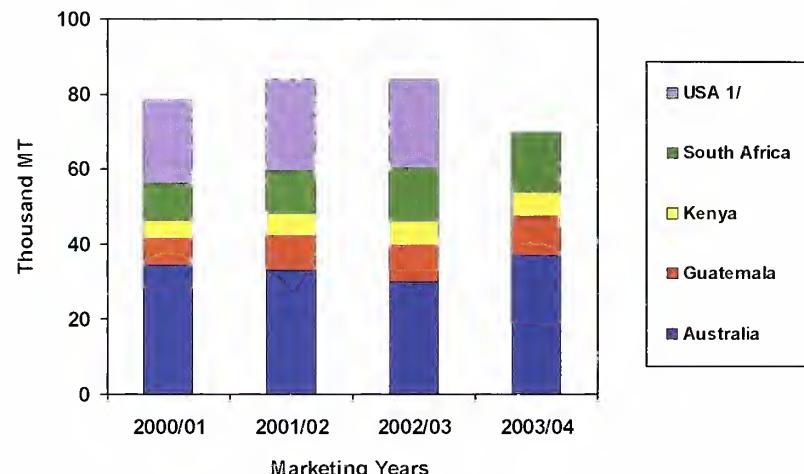


U.S. Share of Global In-shell Hazelnut Exports



Source: Global Trade Atlas

Macadamia Nut Production in Selected Countries



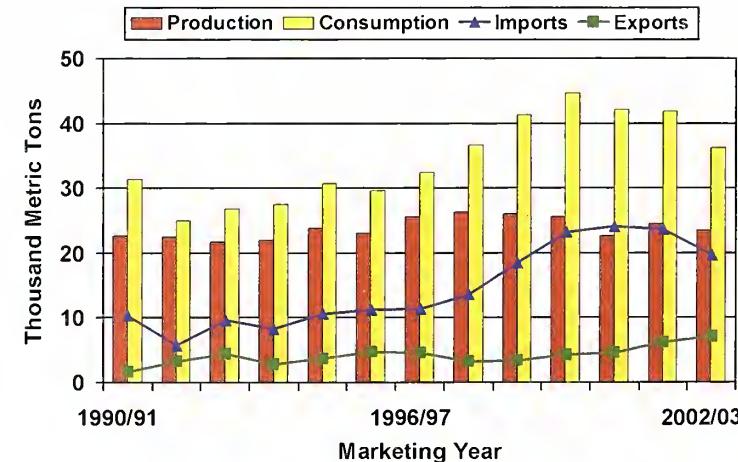
Source: Agricultural Attaché Reports, USDA 1/ 2003/2004 Data not available.

U.S. Macadamia Exports and Global Market Share



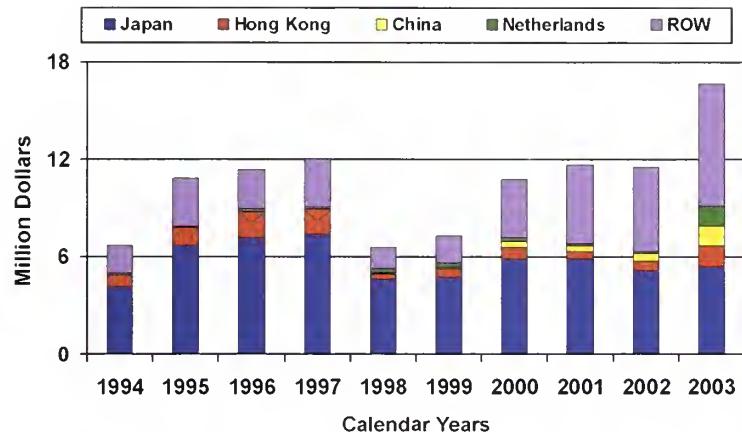
Source: Agricultural Attaché Reports, USDA

U.S. Macadamia Production, Utilization, and Trade



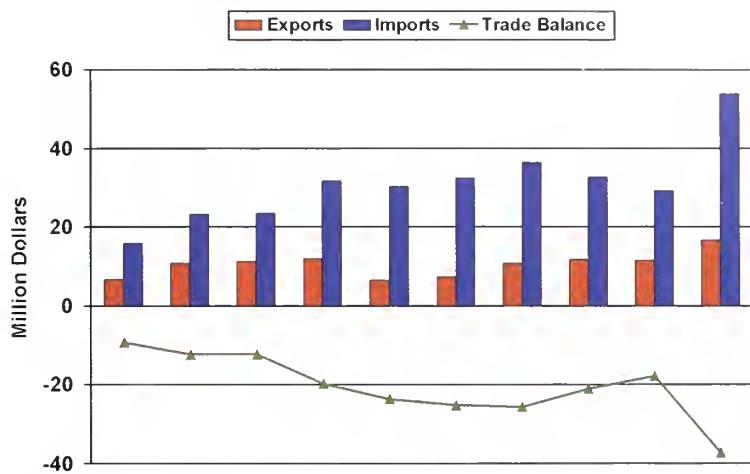
Source: National Agricultural Statistics Service, USDA; Economic Research Service, USDA

Top U.S. Macadamia Export Markets



Source: Bureau of the Census, DOC

U.S. Trade Balance: Macadamia Nuts

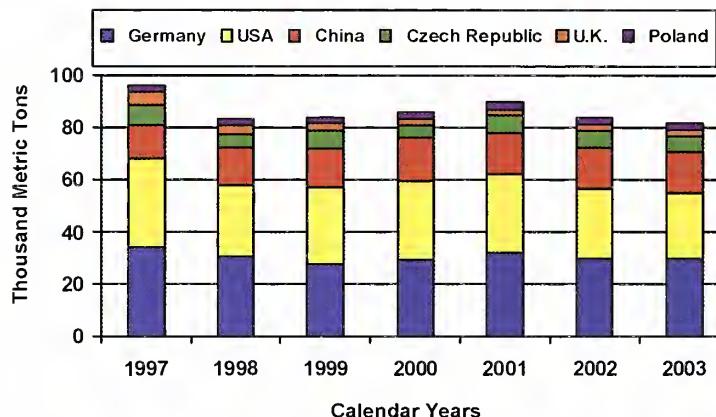


Source: Bureau of the Census, DOC

The U.S. and World Situation: Hops

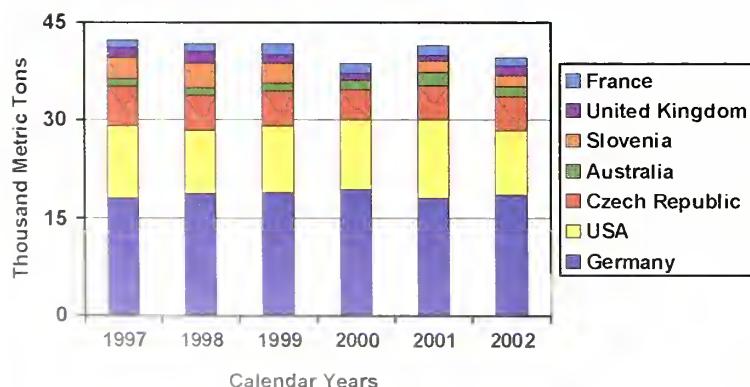
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

Major Hop Producers



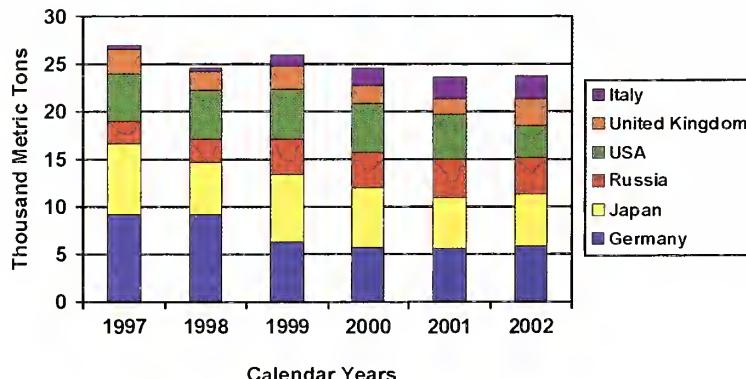
Source: Food and Agriculture Organization (FAO) of the United Nations

Major Hop Exporters



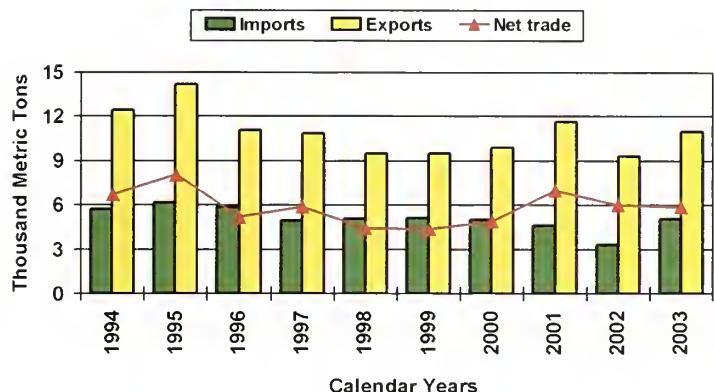
Source: Global Trade Atlas and Food and Agriculture Organization (FAO) of the United Nations

Major Hop Importers

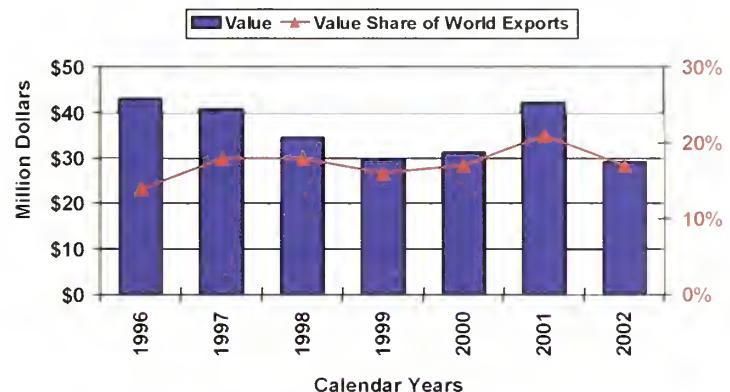


Source: Global Trade Atlas

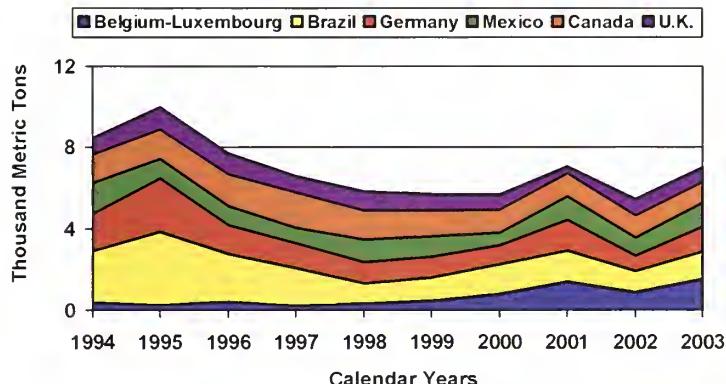
U.S. Trade in Hops



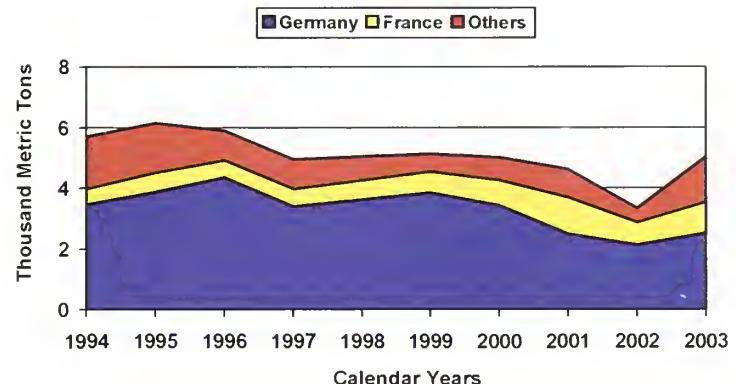
U.S. Hop Exports: Value and Export Value Share



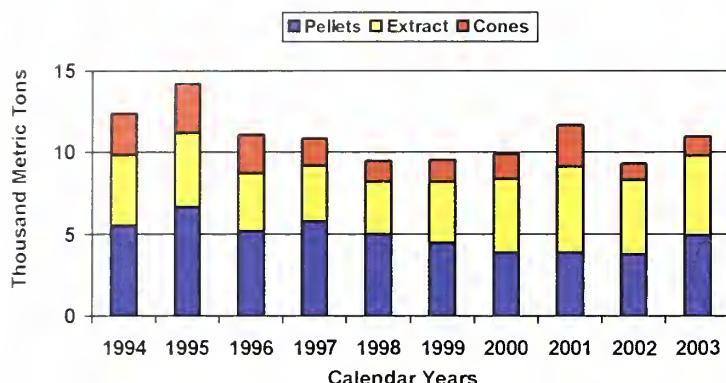
U.S. Hop Export Market: Top Destinations



U.S. Hop Import Market: Top Suppliers

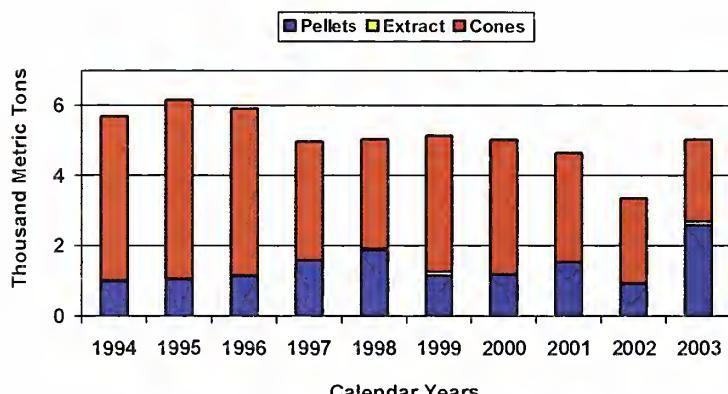


Composition of U.S. Hop Exports



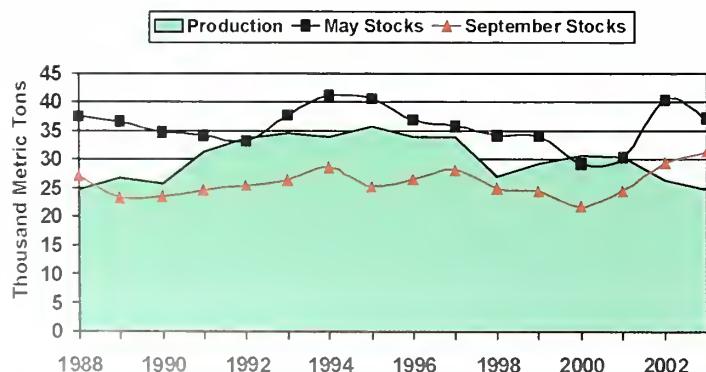
Source: Bureau of the Census, DOC

Composition of U.S. Hop Imports



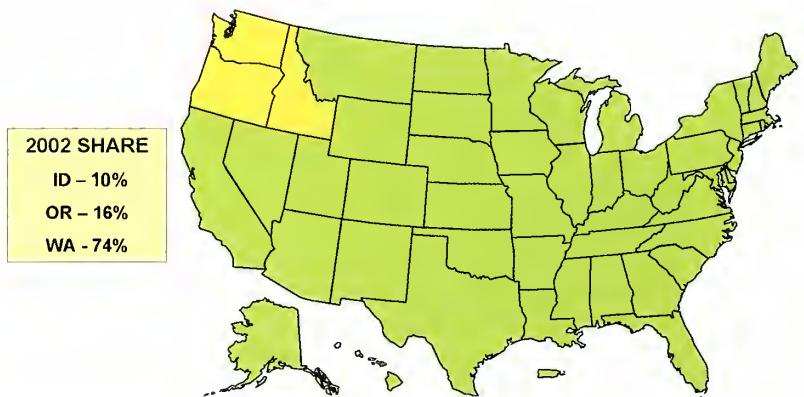
Source: Bureau of the Census, DOC

U.S. Hop Production and Stocks



Source: National Agricultural Statistics Service, USDA

U.S. Hop Producing States



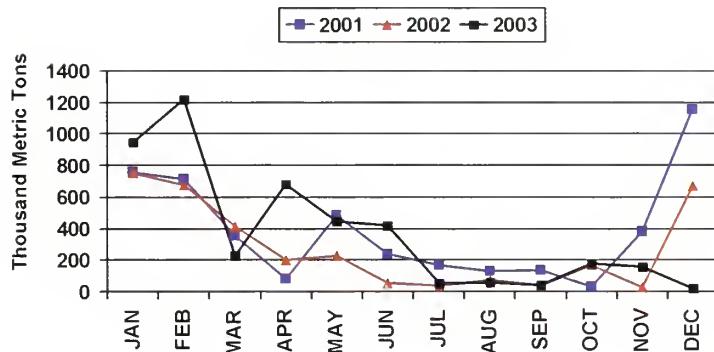
Source: National Agricultural Statistics Service, USDA

U.S. Hops: Season Average Prices and Yield



Source: National Agricultural Statistics Service, USDA

U.S. Monthly Hop Imports

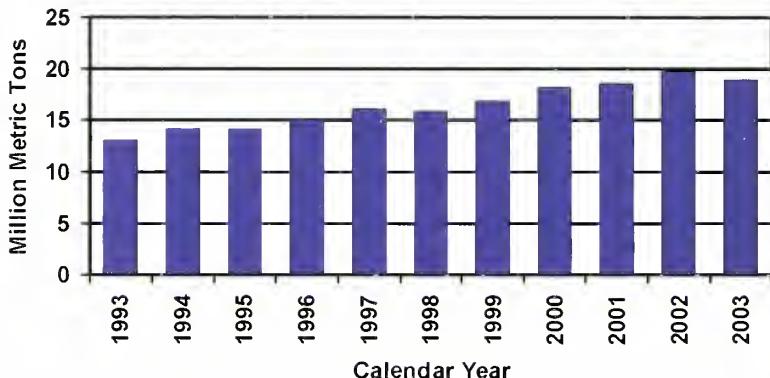


Source: Bureau of the Census, DOC

The U.S. and World Situation: Lettuce

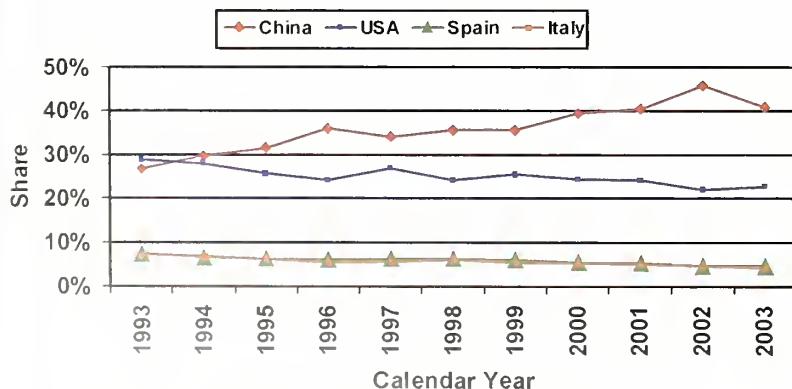
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

World Lettuce Production



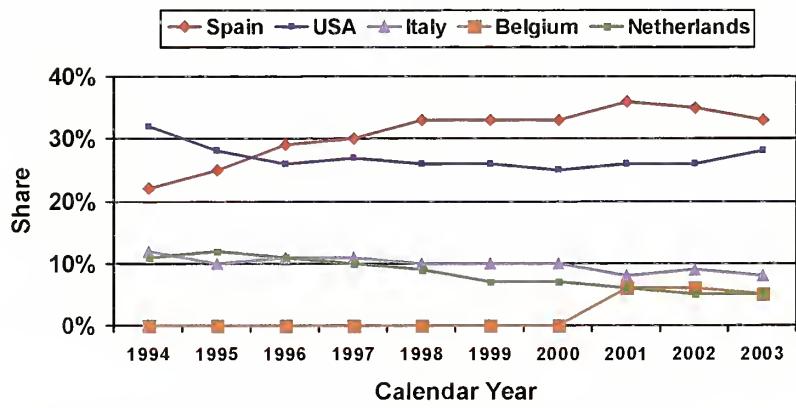
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Producers' Share of Global Lettuce Production by Quantity

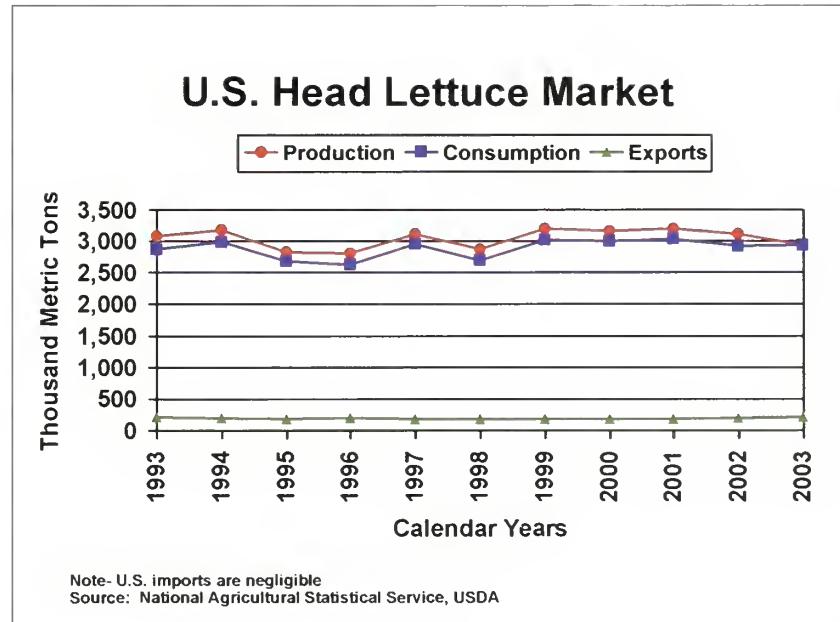
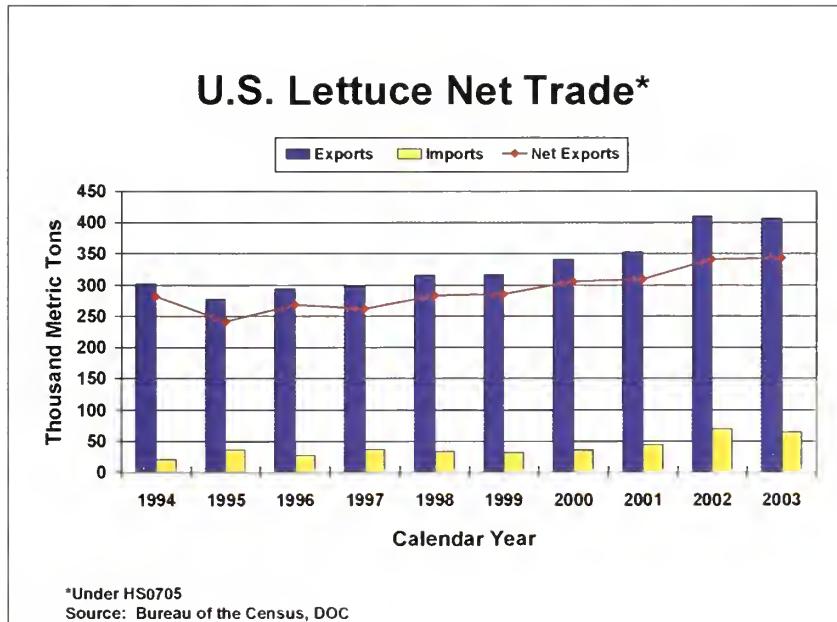
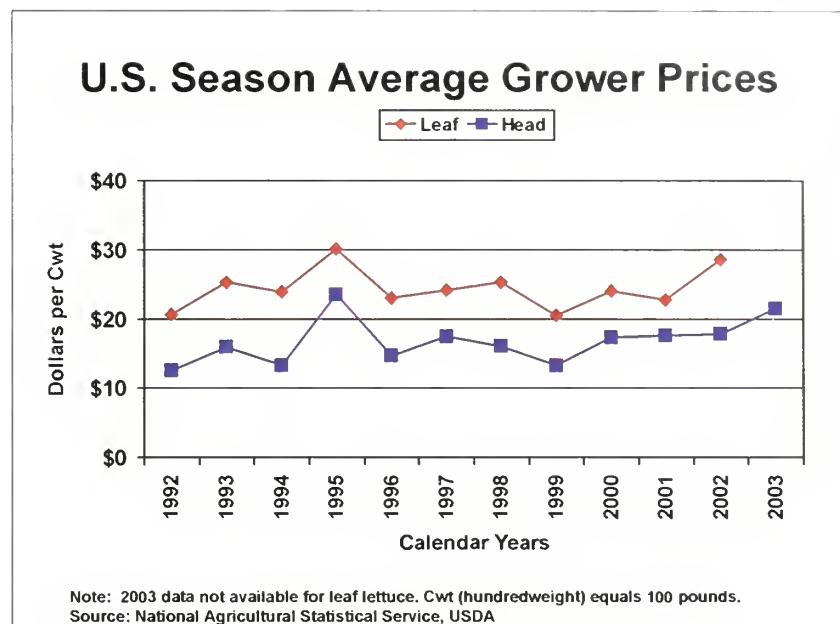
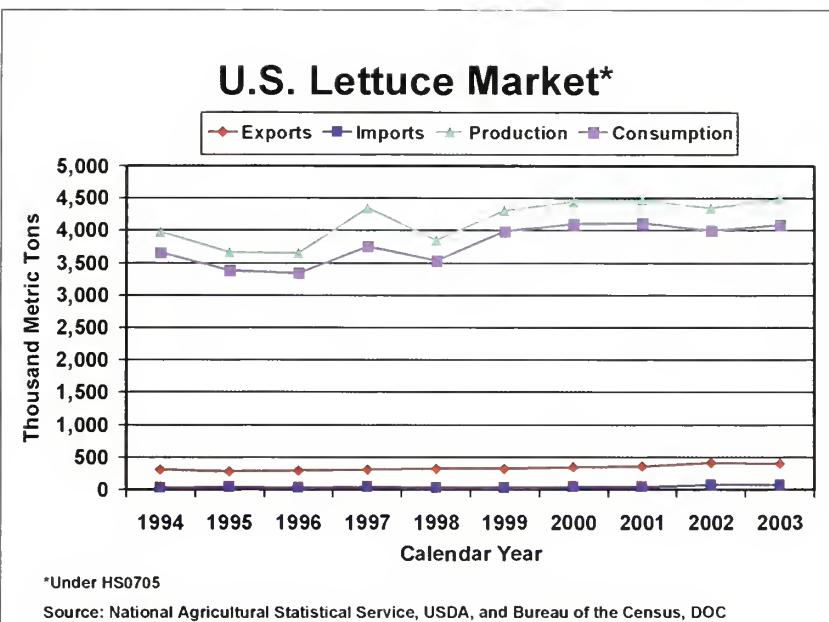


Source: Food and Agriculture Organization (FAO) of the United Nations

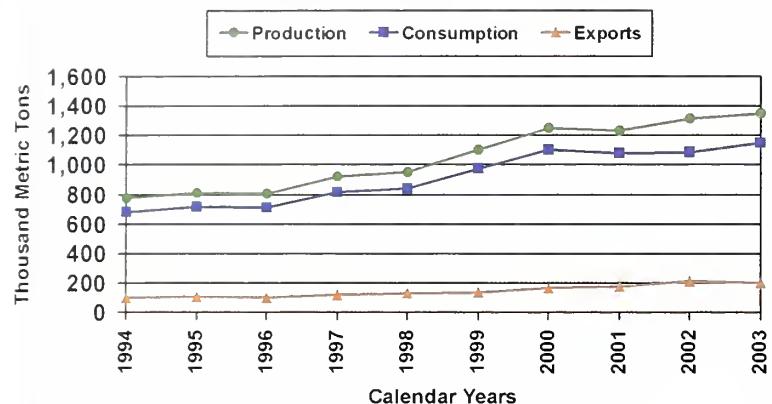
Top Exporters' Share of Global Lettuce Exports by Quantity



Source: Food and Agriculture Organization (FAO) of the United Nations



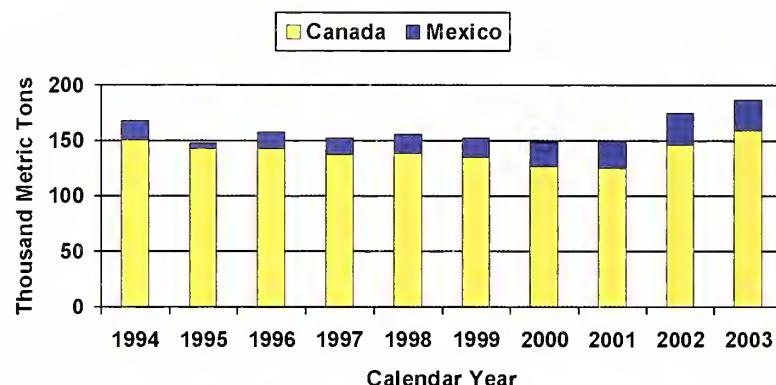
U.S. Leaf Lettuce Market



Note- U.S. imports are negligible

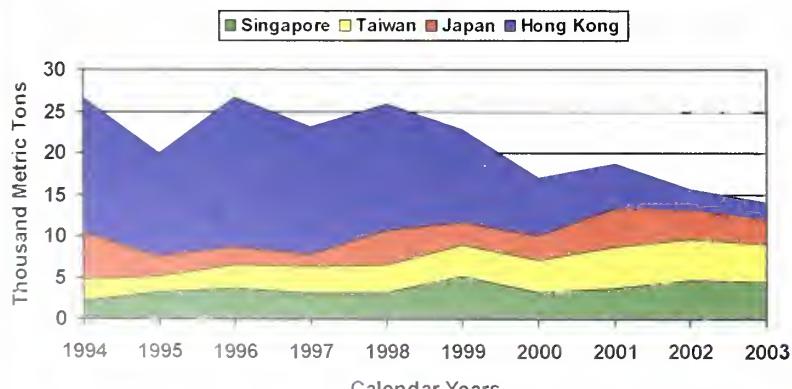
Source: National Agricultural Statistical Service, USDA

U.S. Head Lettuce Exports to Canada and Mexico



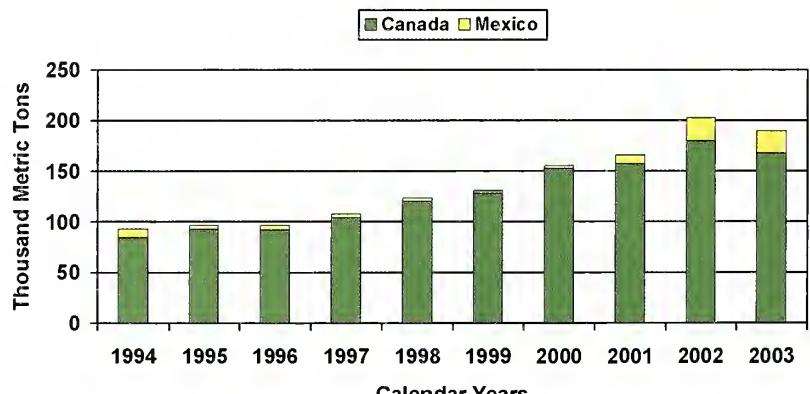
Source: Bureau of the Census, DOC

U.S. Head Lettuce Exports to Top Markets, Excluding Canada and Mexico



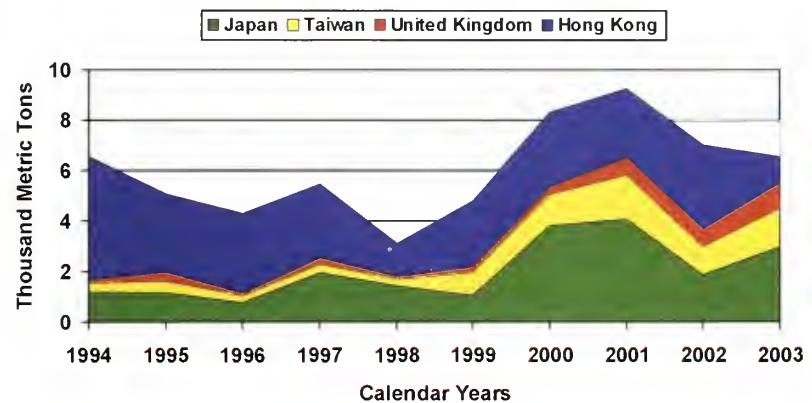
Source: Bureau of the Census, DOC

U.S. Leaf Lettuce Exports to Canada and Mexico



Source: Bureau of the Census, DOC

U.S. Leaf Lettuce Exports to Top Markets, Excluding Canada and Mexico

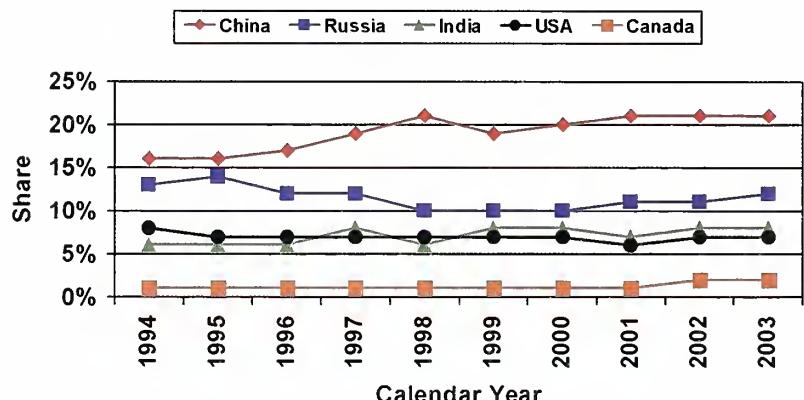


Source: Bureau of the Census, DOC

The U.S. and World Situation: Fresh and Processed Potatoes

USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

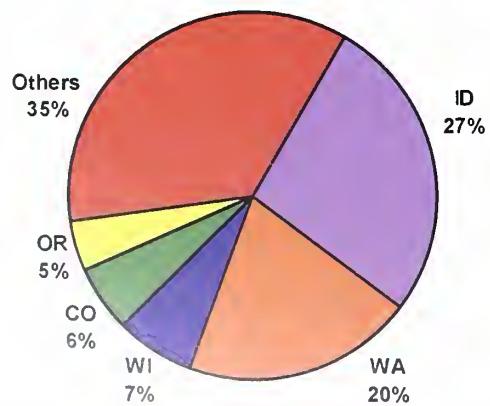
Major Producers' Share of World Fresh Potato Production by Quantity



Source: Food and Agriculture Organization (FAO) of the United Nations

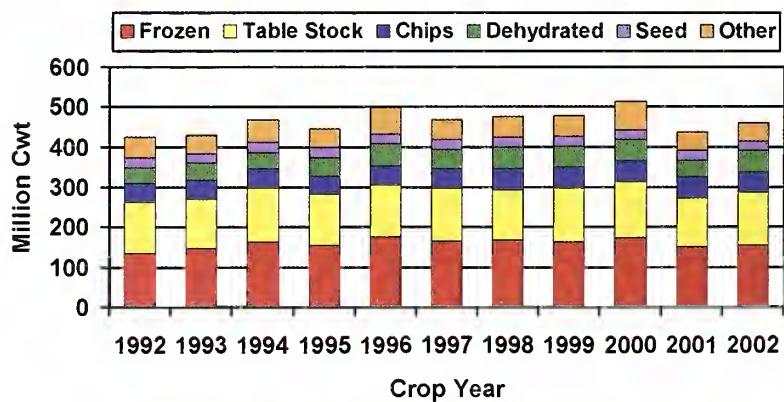
U.S. Potato Production by State

Production Estimated at 459 Million Cwt for Crop Year 2003



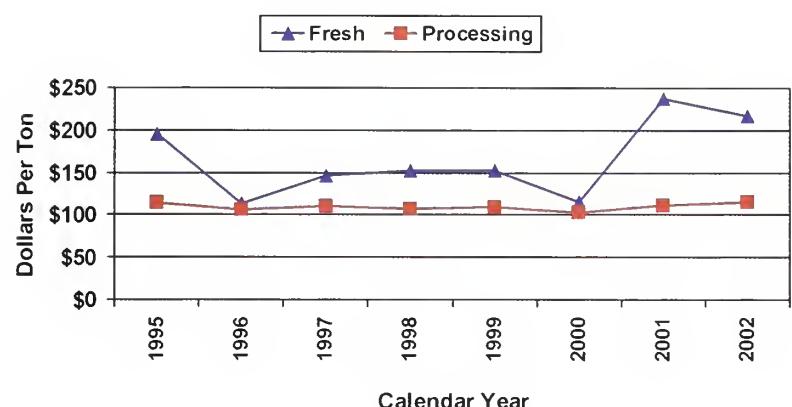
Note: Cwt (hundredweight) is the unit used for fresh market yield and is equal to 100 pounds.
Crop year is associated with the calendar year in which harvest is accomplished.
Source: National Agricultural Statistics Service, USDA

Market Utilization of U.S. Potatoes



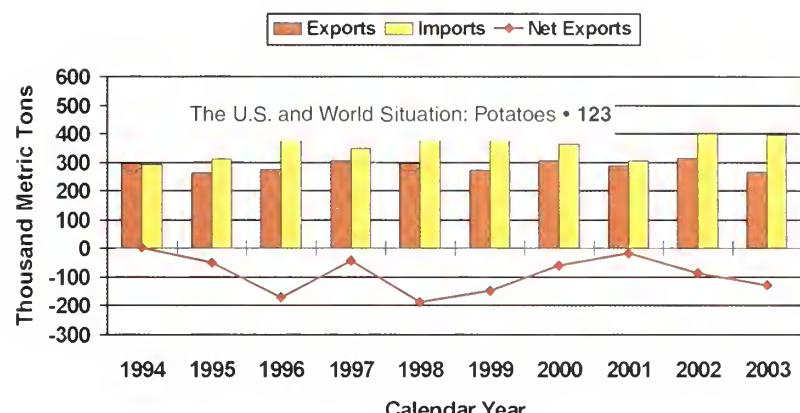
Note: Cwt (hundredweight) equals 100 pounds. Crop year is associated with the calendar year in which harvest is accomplished.
Source: National Agricultural Statistics Service, USDA

Average Grower Prices for U.S. Potatoes



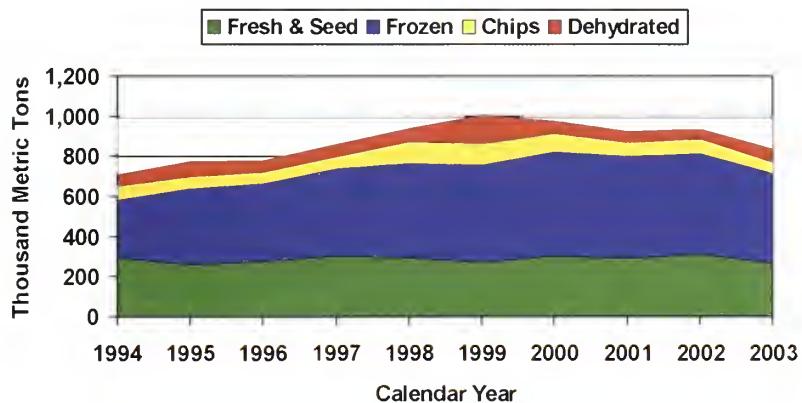
Source: Economic Research Service, USDA

U.S. Net Trade in Fresh Potatoes*



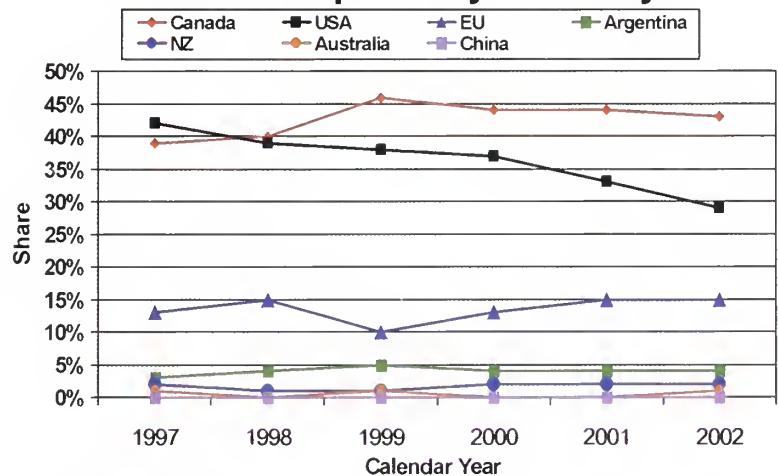
*Includes fresh and seed
Source: Bureau of the Census, DOC

U.S. Exports of Potatoes and Products*



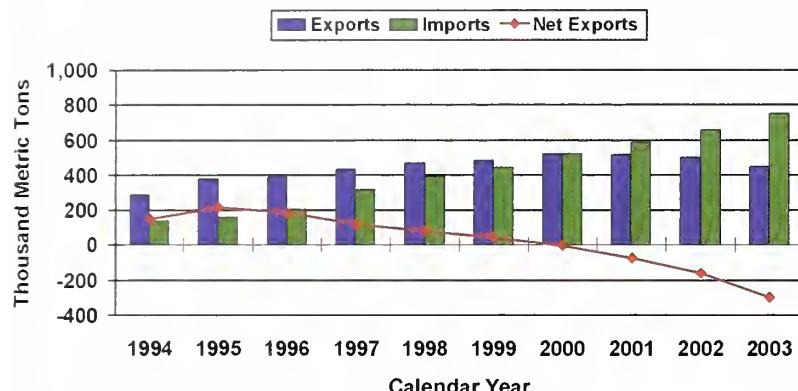
*Does not include flour and starch.
Source: Bureau of the Census, DOC

Top Exporters' Shares of Frozen Potato Products Exports by Quantity*



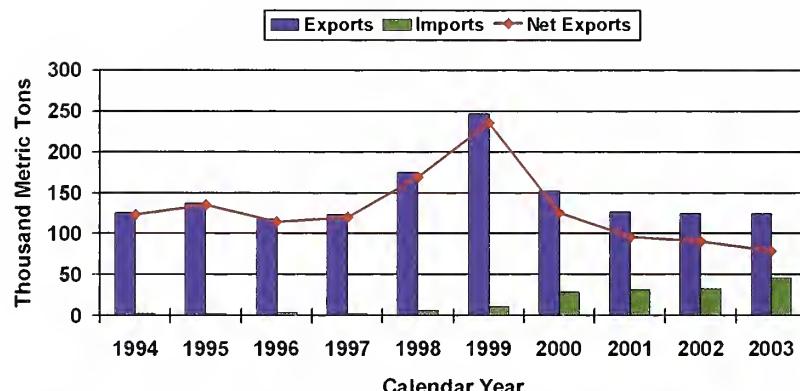
*Under HS #200410
Source: Global Trade Atlas

U.S. Net Trade in Frozen Potato Products



Source: Bureau of the Census, DOC

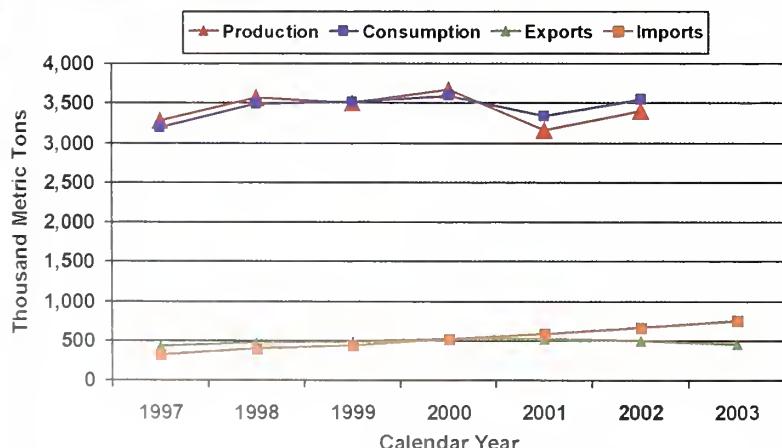
U.S. Net Trade in Dehydrated Potato Products*



*Includes chips. Does not include flour and starch.

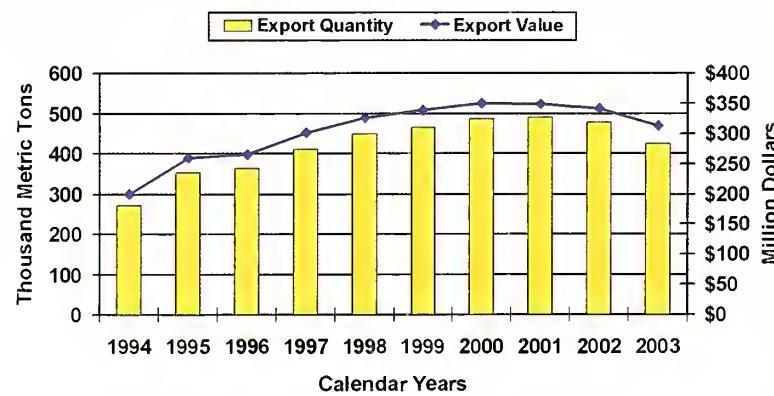
Source: Bureau of the Census, DOC

U.S. Market for Frozen Potato Products



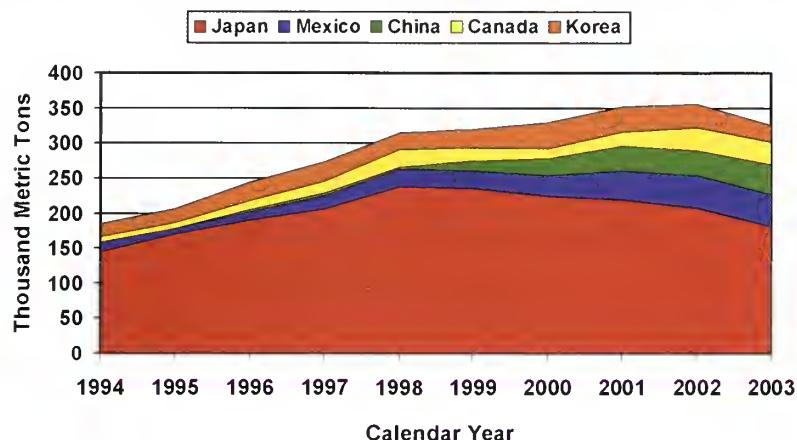
Note: 2003 production and consumption not available. A conversion factor of 0.55 is used to estimate frozen potato fry production based on the potatoes utilized for processing.
Source: Economic Research Service, USDA and Bureau of the Census, DOC

U.S. Frozen Potato Fry Exports



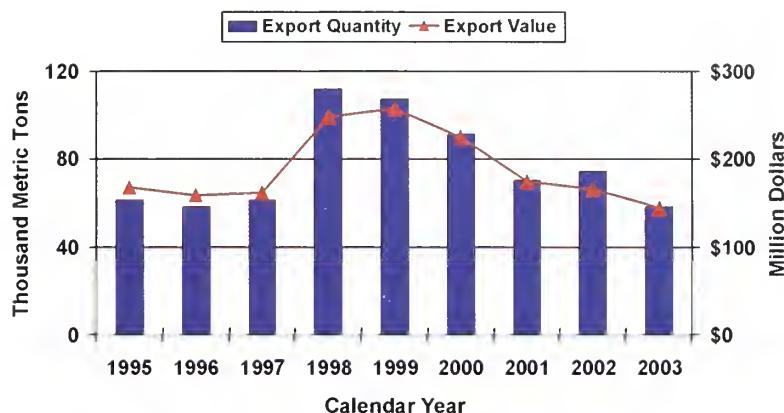
Source: Bureau of the Census, DOC, and National Agricultural Statistics Service, USDA

U.S. Frozen Fry Exports to Top Markets



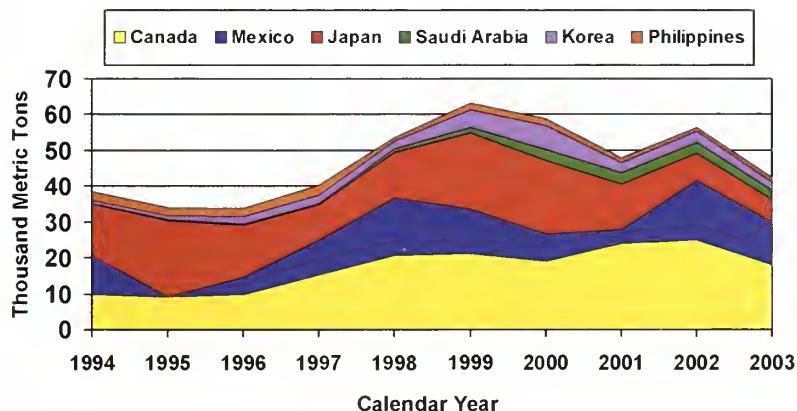
Source: Bureau of the Census, DOC

U.S. Exports of Potato Chips



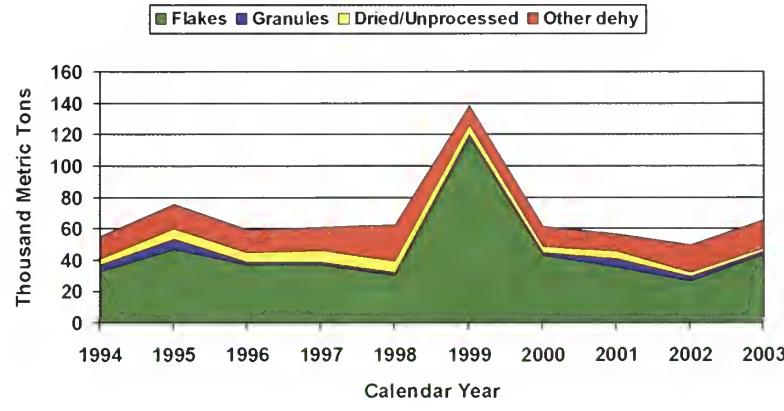
Source: Bureau of the Census,
DOC

U.S. Potato Chip Exports to Top Markets



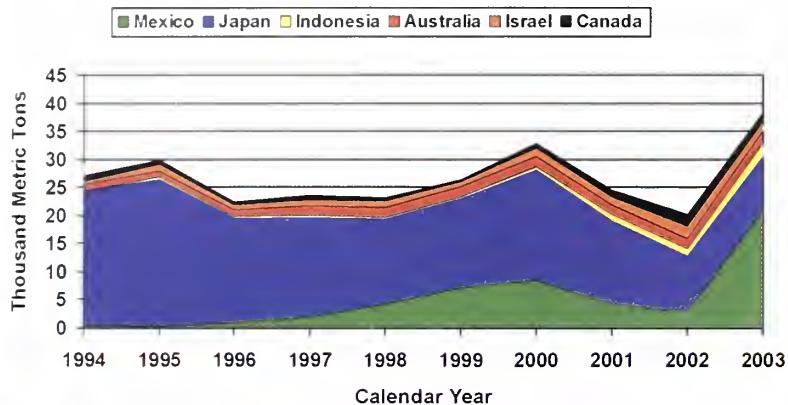
Source: Bureau of the Census, DOC

U.S. Exports of Dehydrated Potato Products



Source: Bureau of the Census, DOC

U.S. Exports of Dehydrated Potato Flakes to Top Markets

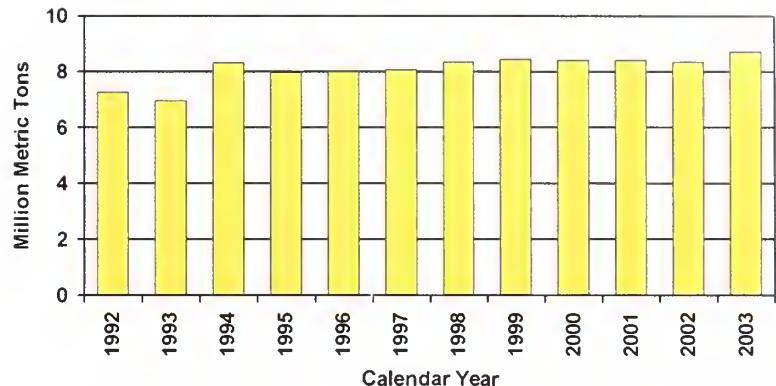


Source: Bureau of the Census, DOC

The U.S. and World Situation: Fresh and Processed Sweet Corn

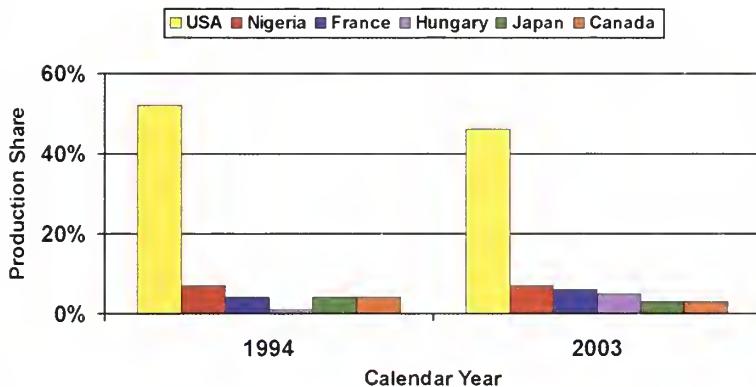
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

World Sweet Corn Production



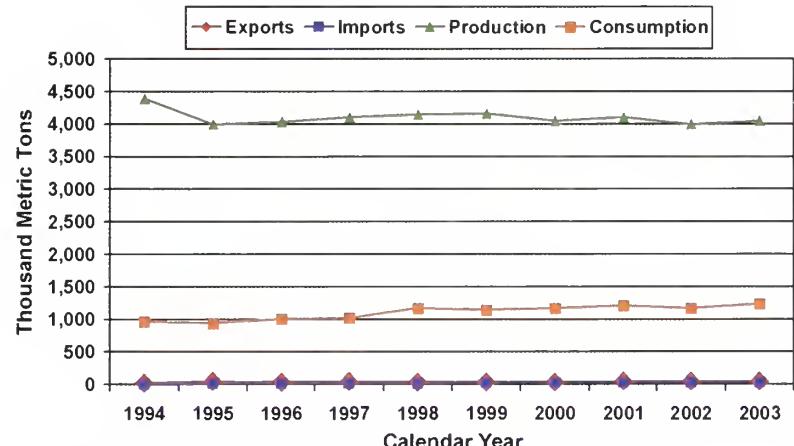
Source: Food and Agriculture Organization (FAO) of the United Nations

Top Producers' Share of World Sweet Corn Production



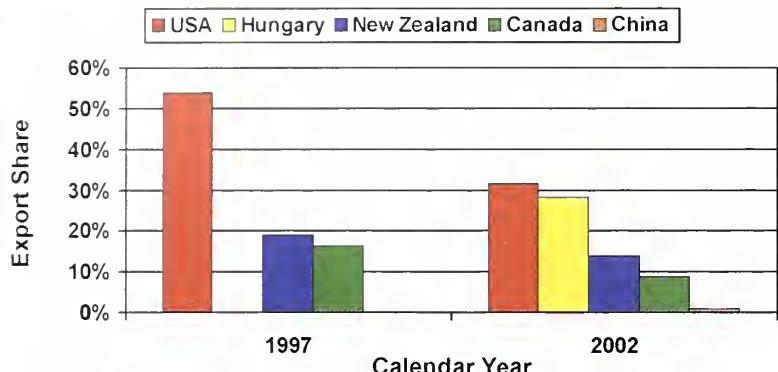
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Fresh Sweet Corn Market



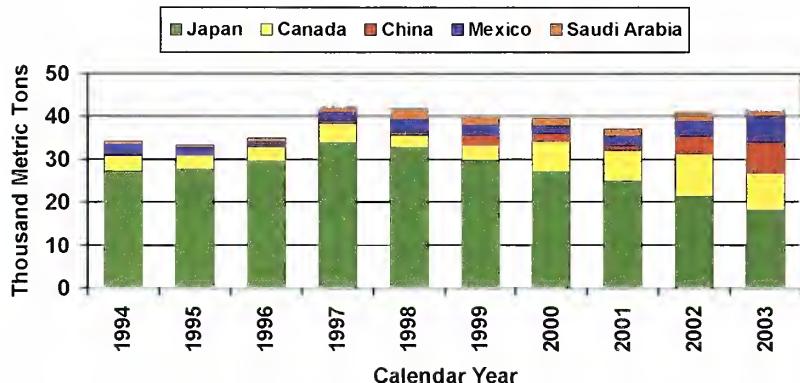
Source: Economic Research Service, USDA and Bureau of the Census, DOC

Top Exporters' Share of World Frozen Sweet Corn Exports by Quantity



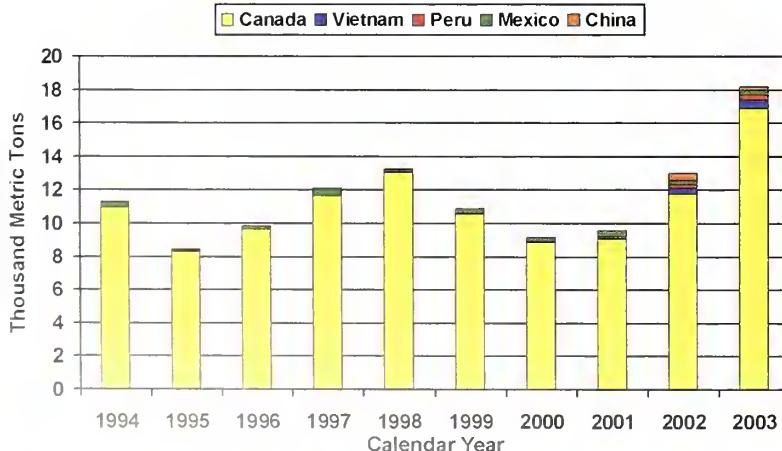
Source: Global Trade Atlas

U.S. Frozen Exports to Major Markets



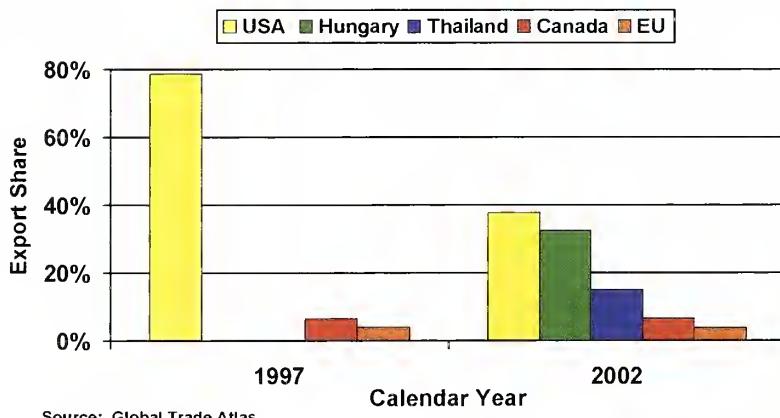
Source: Bureau of the Census, DOC

U.S. Frozen Sweet Corn Imports from Major Suppliers



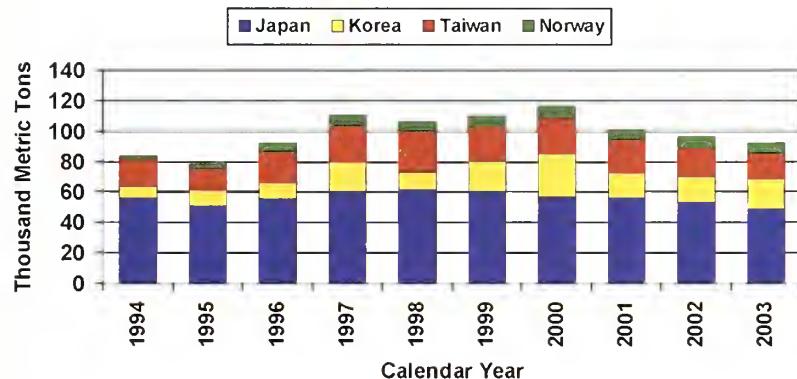
Source: Bureau of the Census, DOC

Top Exporters' Share of World Canned Sweet Corn Exports by Quantity



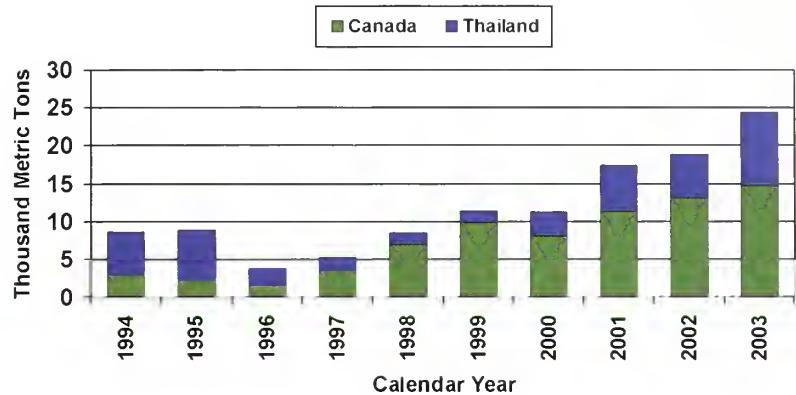
Source: Global Trade Atlas

U.S. Canned Sweet Corn Exports to Major Markets



Source: Bureau of the Census, DOC

U.S. Canned Sweet Corn Imports from Major Markets

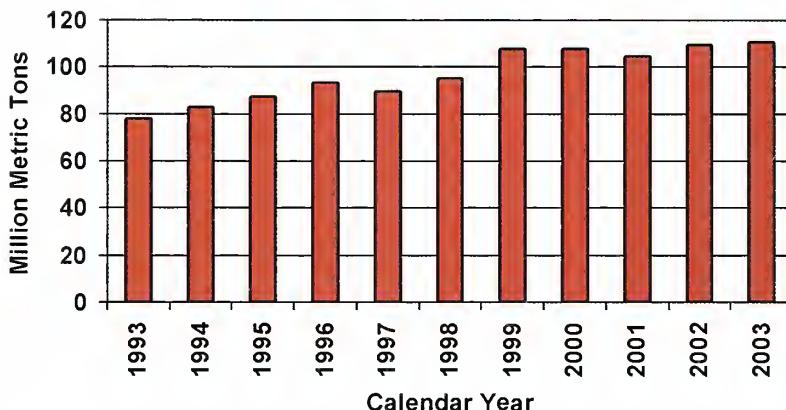


Source: Bureau of the Census, DOC

The U.S. and World Situation: Fresh and Processed Tomatoes

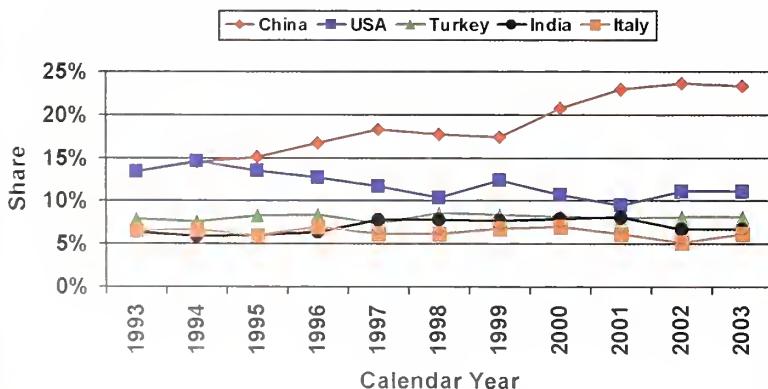
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

World Tomato Production



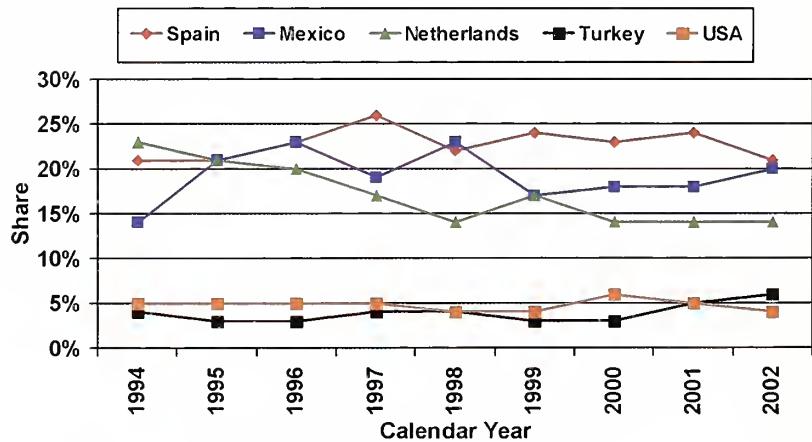
Source: Food and Agriculture Organization (FAO) of the United Nations

Major Producers' Shares of World Tomato Production by Quantity



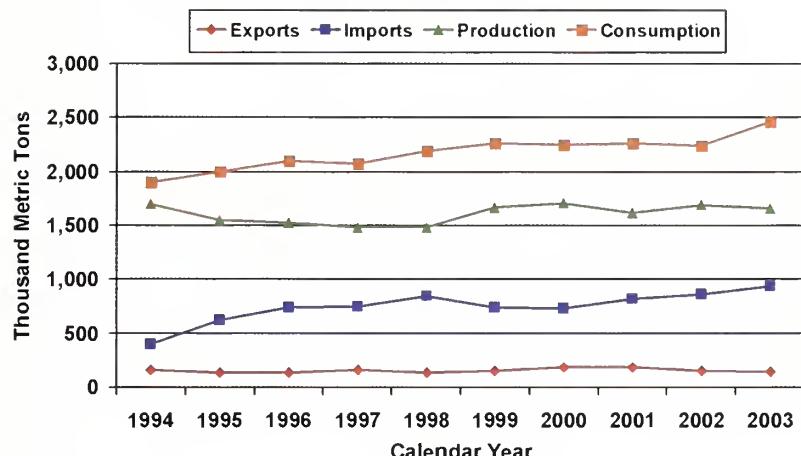
Source: Food and Agriculture Organization (FAO) of the United Nations

Major Exporters' Shares of World Tomato Exports by Quantity



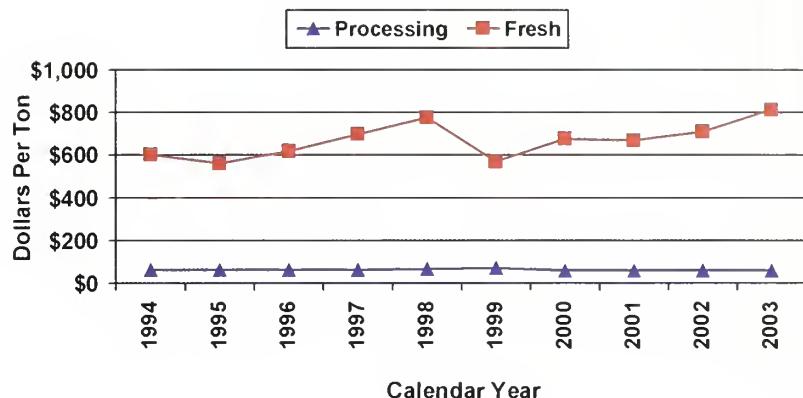
Source: Food and Agriculture Organization (FAO) of the United Nations

U.S. Fresh Tomato Market



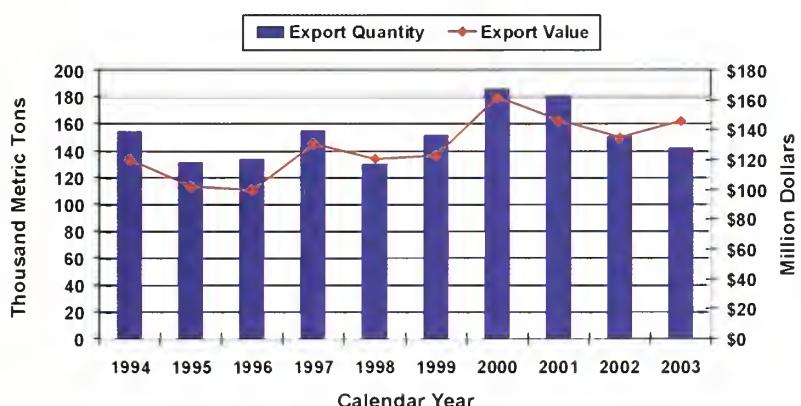
Source: National Agricultural Statistics Service, USDA, and Bureau of the Census, DOC

Average Grower Prices for U.S. Tomatoes



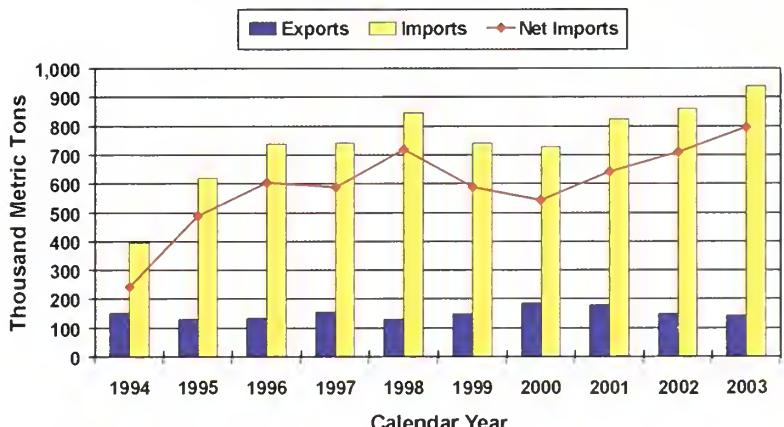
Source: Economic Research Service, USDA

U.S. Fresh Tomato Exports



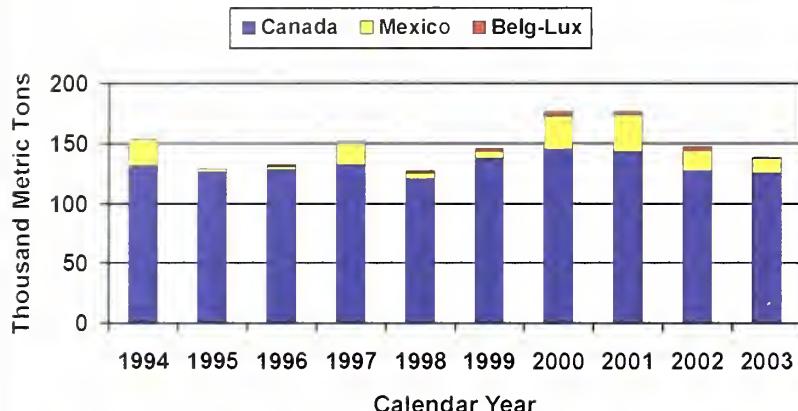
Source: Economic Research Service, USDA and Bureau of the Census, DOC

U.S. Fresh Tomato Trade



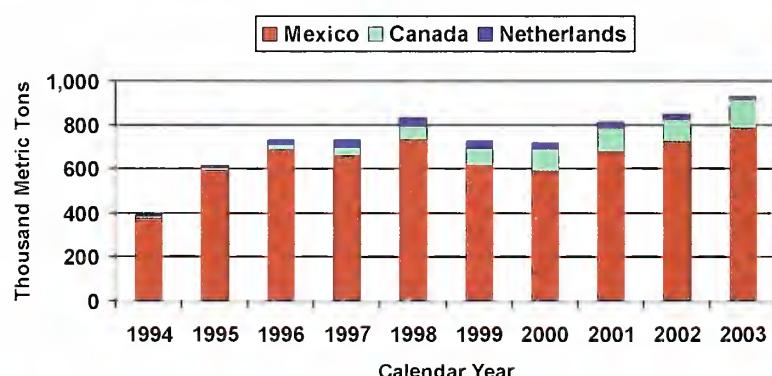
Source: Bureau of the Census, DOC

U.S. Exports of Fresh Tomatoes to Major Markets



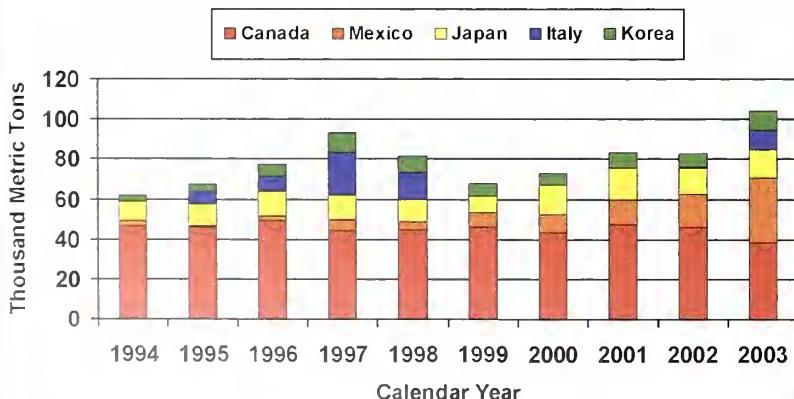
Source: Bureau of the Census, DOC

U.S. Imports of Fresh Tomatoes from Major Suppliers



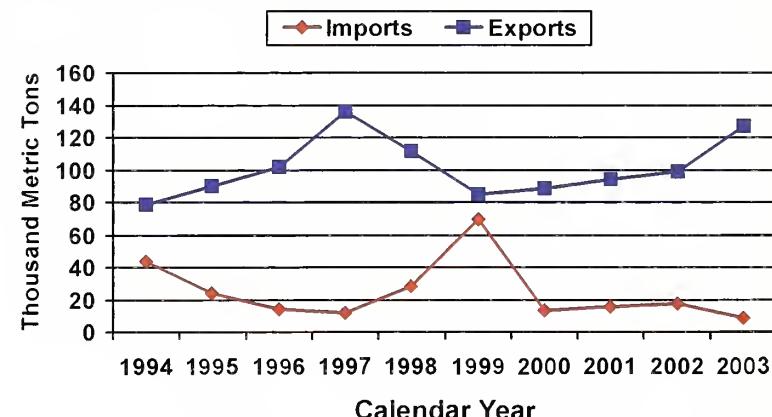
Source: Bureau of the Census, DOC

U.S. Exports of Tomato Paste to Major Markets



Source: Bureau of the Census, DOC

U.S. Tomato Paste Trade

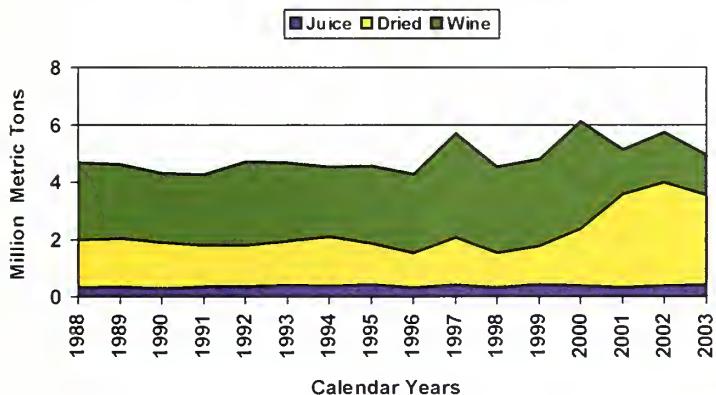


Source: Bureau of the Census, DOC

The U.S. and World Situation: Wine

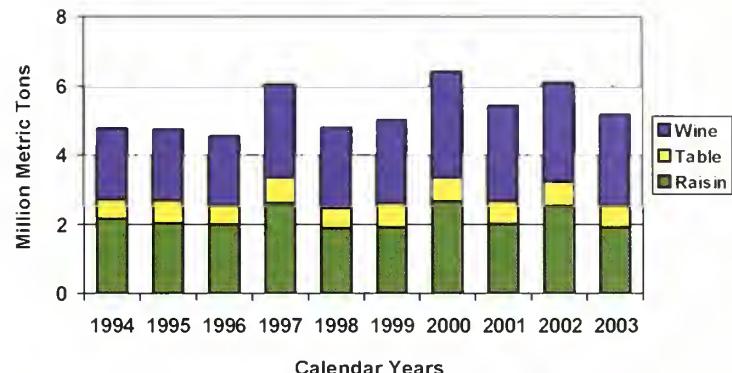
USDA
Foreign Agricultural Service
Horticultural & Tropical Products Division
April 2004

U.S. Processed Grapes Utilization



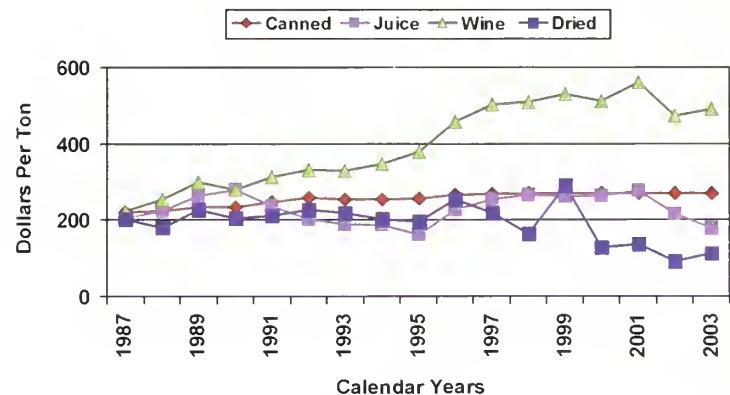
Source: National Agricultural Statistics Service, USDA

California Grape Production (89 Percent of total U.S. Production)



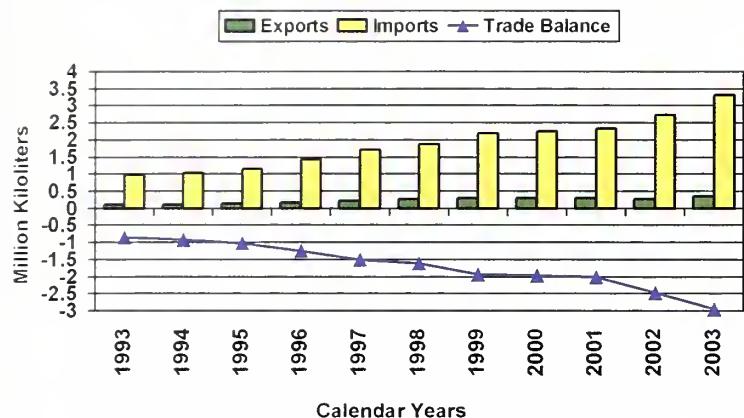
Source: National Agricultural Statistics Service, USDA
Note: Estimates in 2001, 2002, and 2003 includes Texas and Virginia.

U.S. Grapes: Average Grower Prices



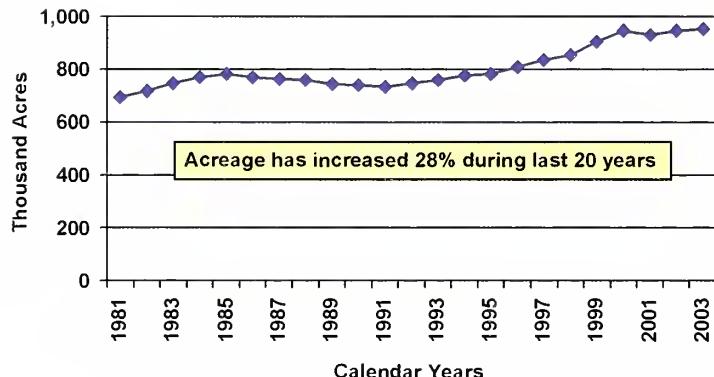
Source: National Agricultural Statistics Service, USDA

U.S. Volume Trade in Wine



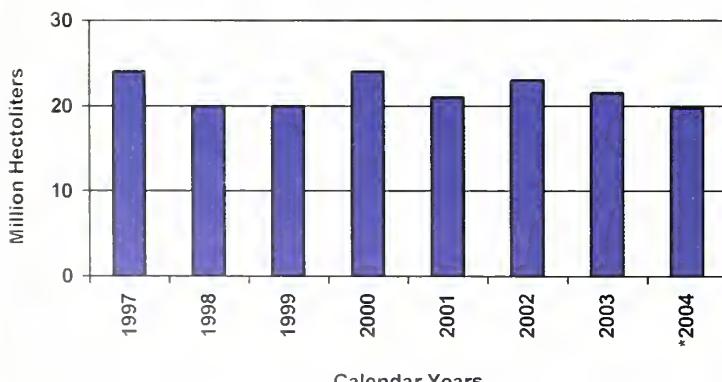
Source: Bureau of the Census, DOC

U.S. Grape Bearing Acreage



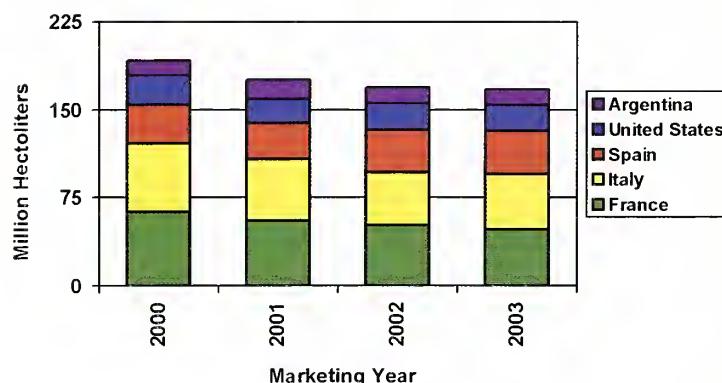
Source: National Agricultural Statistics Service, USDA

U.S. Wine Production



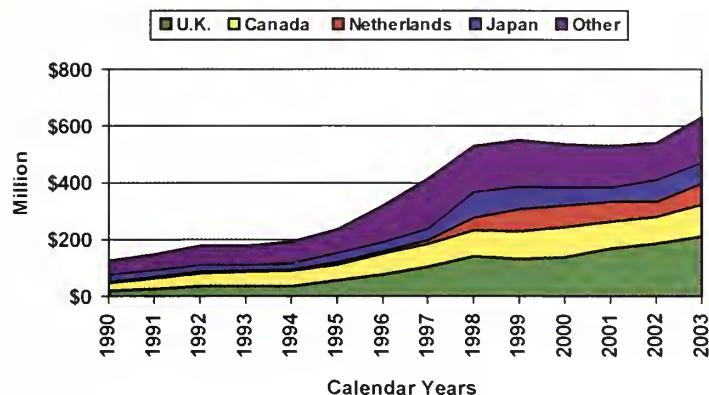
Source: Based on California Grape Crush Report.
Forecast

Top World Producers of Wine



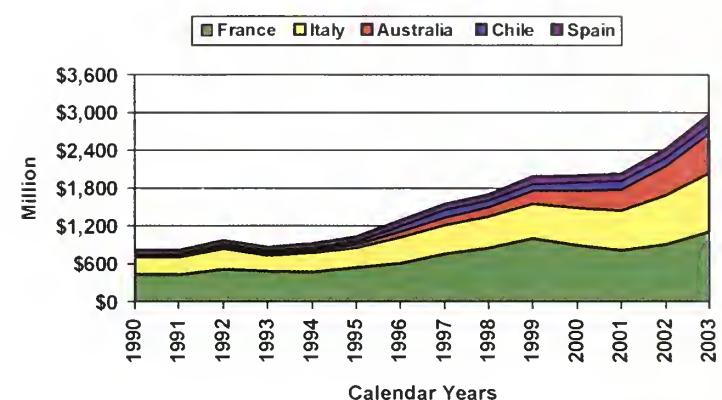
Source: U.S. Department of Agriculture, FAS Attaché Annual Reports
1 hectoliter = 11 cases, 1 case = 12 - 750 ml bottles
Market year begins in August.

U.S. Wine Export Markets



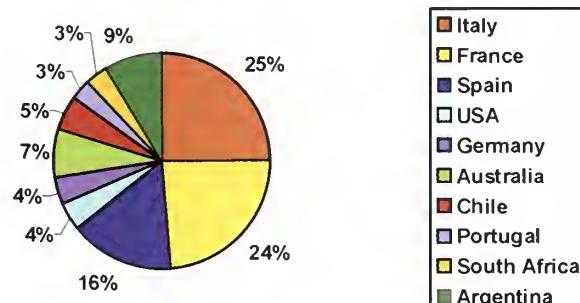
Source: Bureau of the Census, DOC

U.S. Wine Imports



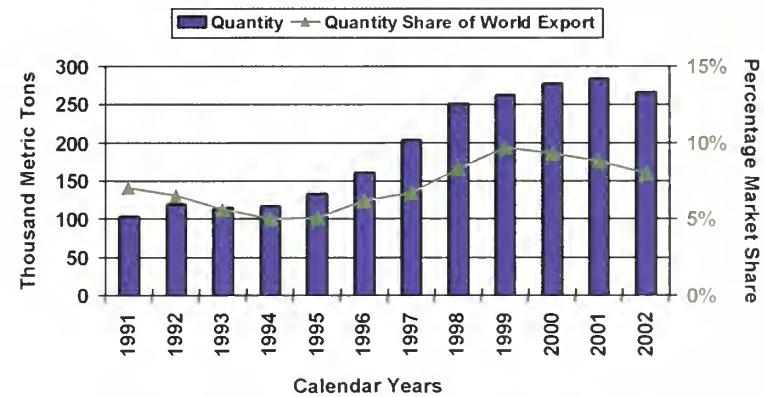
Source: Bureau of the Census, DOC

Wine Export Market Share of Top Producers



Source: Global Trade Atlas

U.S. Wine Exports: Quantity and Export Quantity Share



Source: Food and Agriculture Organization (FAO) of the United Nations

World Wine Trade



France, Italy and Spain account for 58 percent of world exports by volume in 2002.
Source: Global Trade Atlas

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